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CWB Spring 2008 Producer Survey Results

April 2008



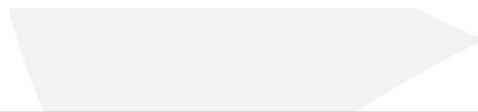
- ❑ Telephone survey conducted between March 7th and March 17th, 2008 as a follow up to the Producer's Survey conducted in November/December of 2007

- ❑ 1300 interviews in Manitoba, Saskatchewan and Alberta with CWB permit book holders
 - The total sample yields a margin of error of +/- 2.68
 - Margin of error in Alberta +/- 5.14
 - Margin of error in Saskatchewan +/- 3.55
 - Margin of error in Manitoba +/- 6.79



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Background Mood and Economic Fundamentals

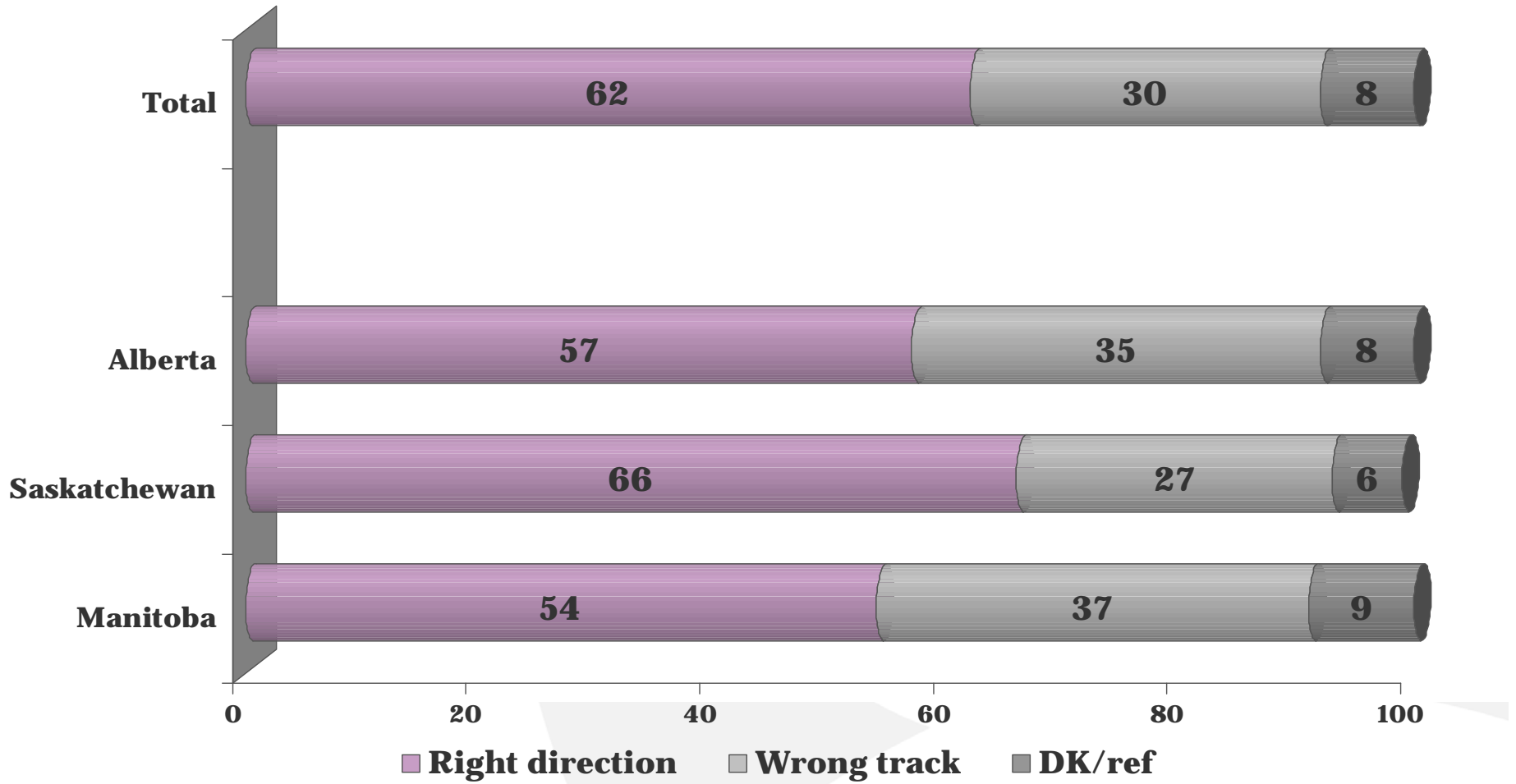




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Direction of Agriculture

Do you feel things in agriculture in <your province> are generally going in the right direction or off on the wrong track?

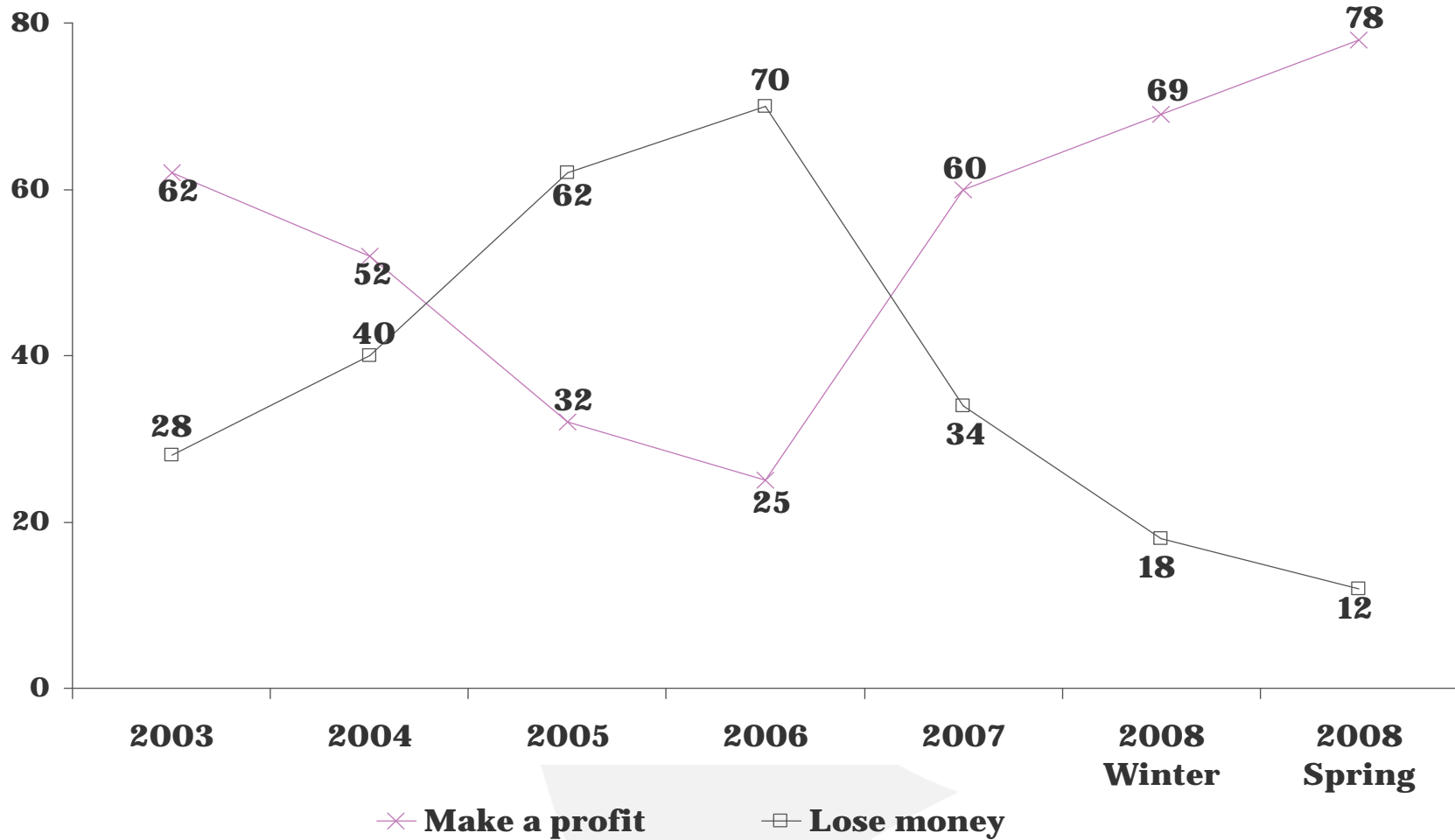




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Farm To Make Profit: Tracking

Do you expect your farm operation to make a profit this year or will lose money?

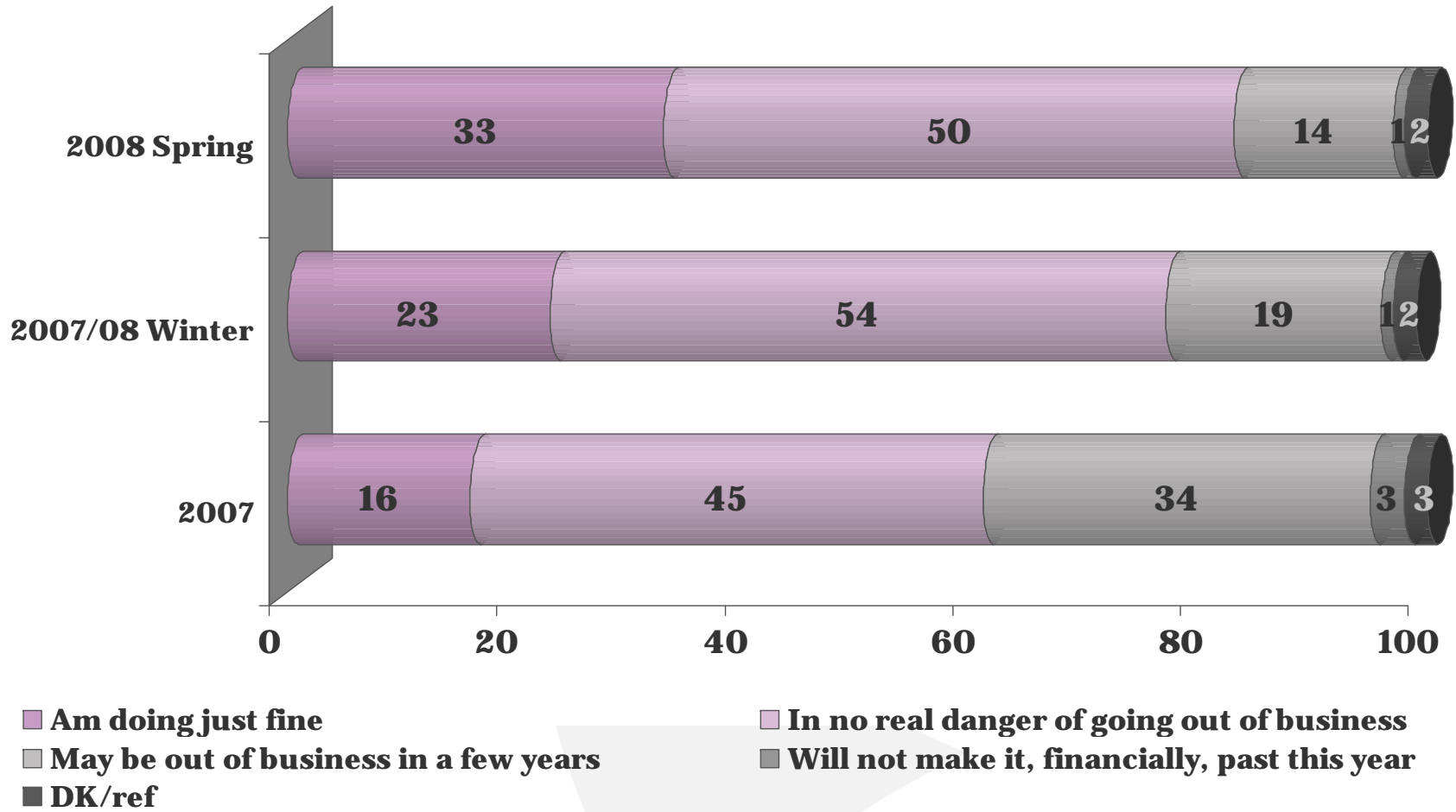




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Your Farm's Situation

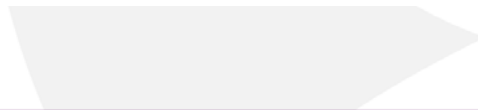
Among the following options, which best describes your situation?





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Farmers Identification and Affinity with Institutions and Organizations

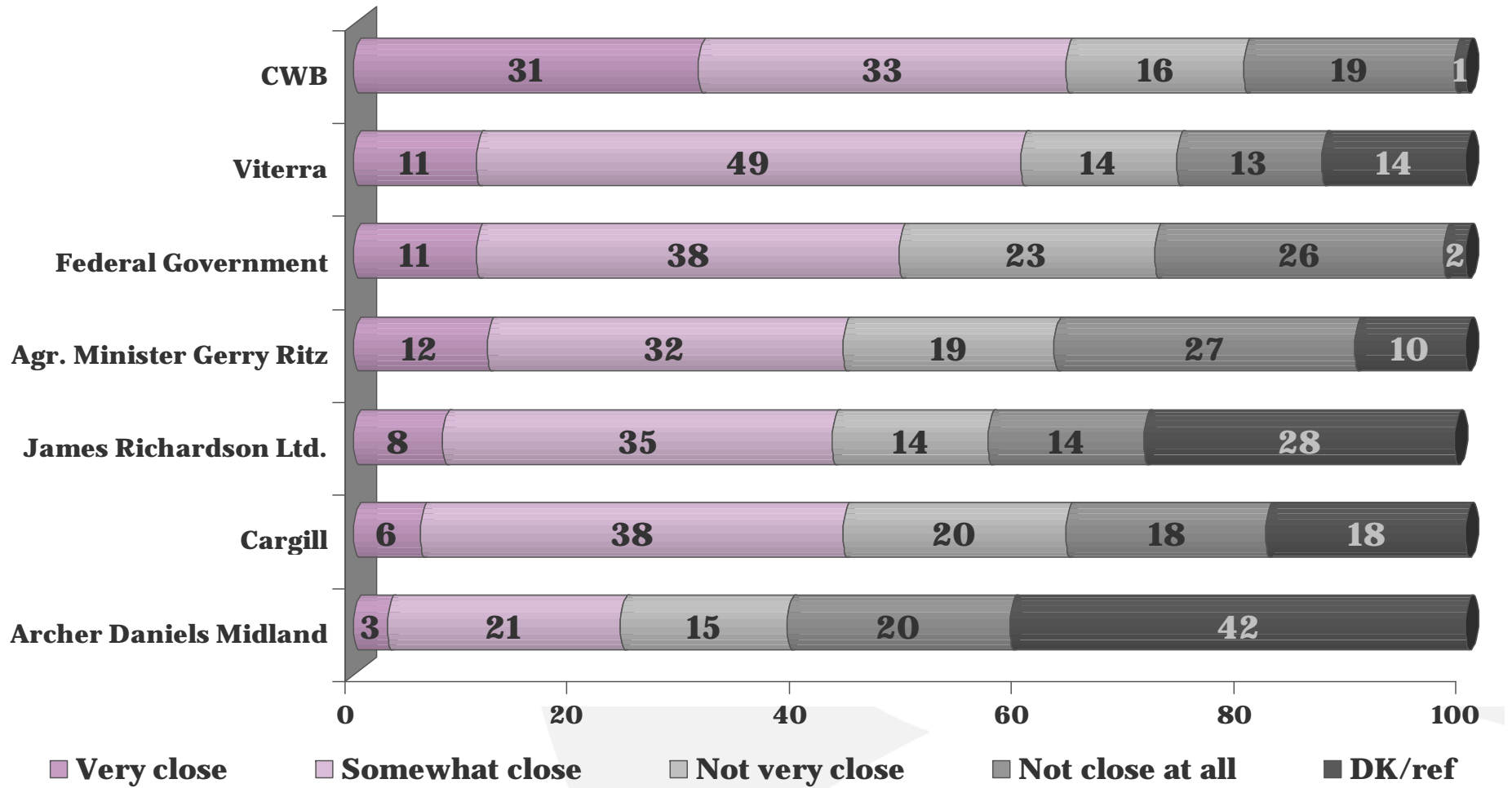




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Views Close to Your Own

Are the views of _____ very close, somewhat close, not very close or not close at all to your own?

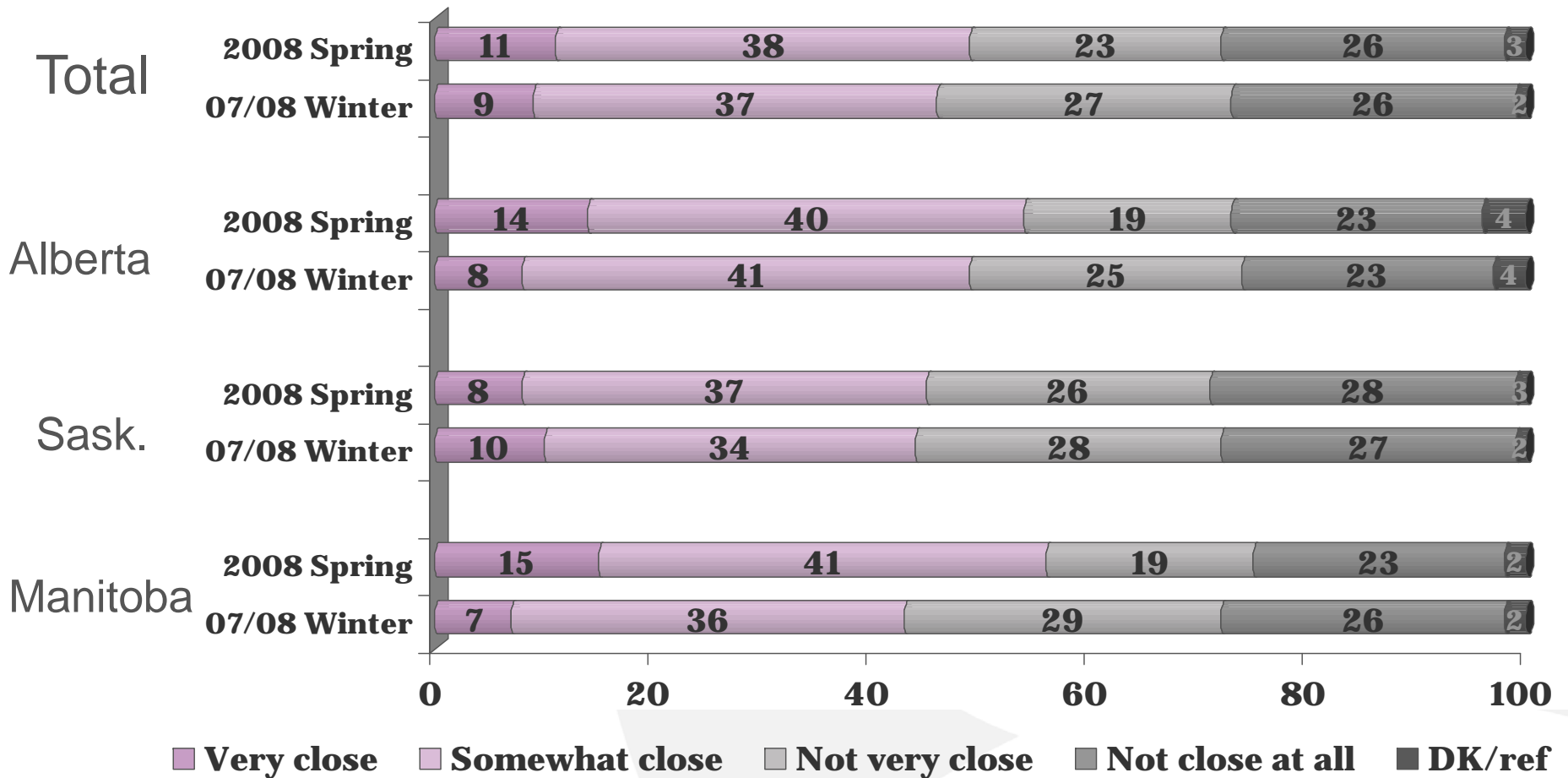




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Views Close to Your Own: Federal Government

Are the views of the Federal Government very close, somewhat close, not very close or not close at all to your own?

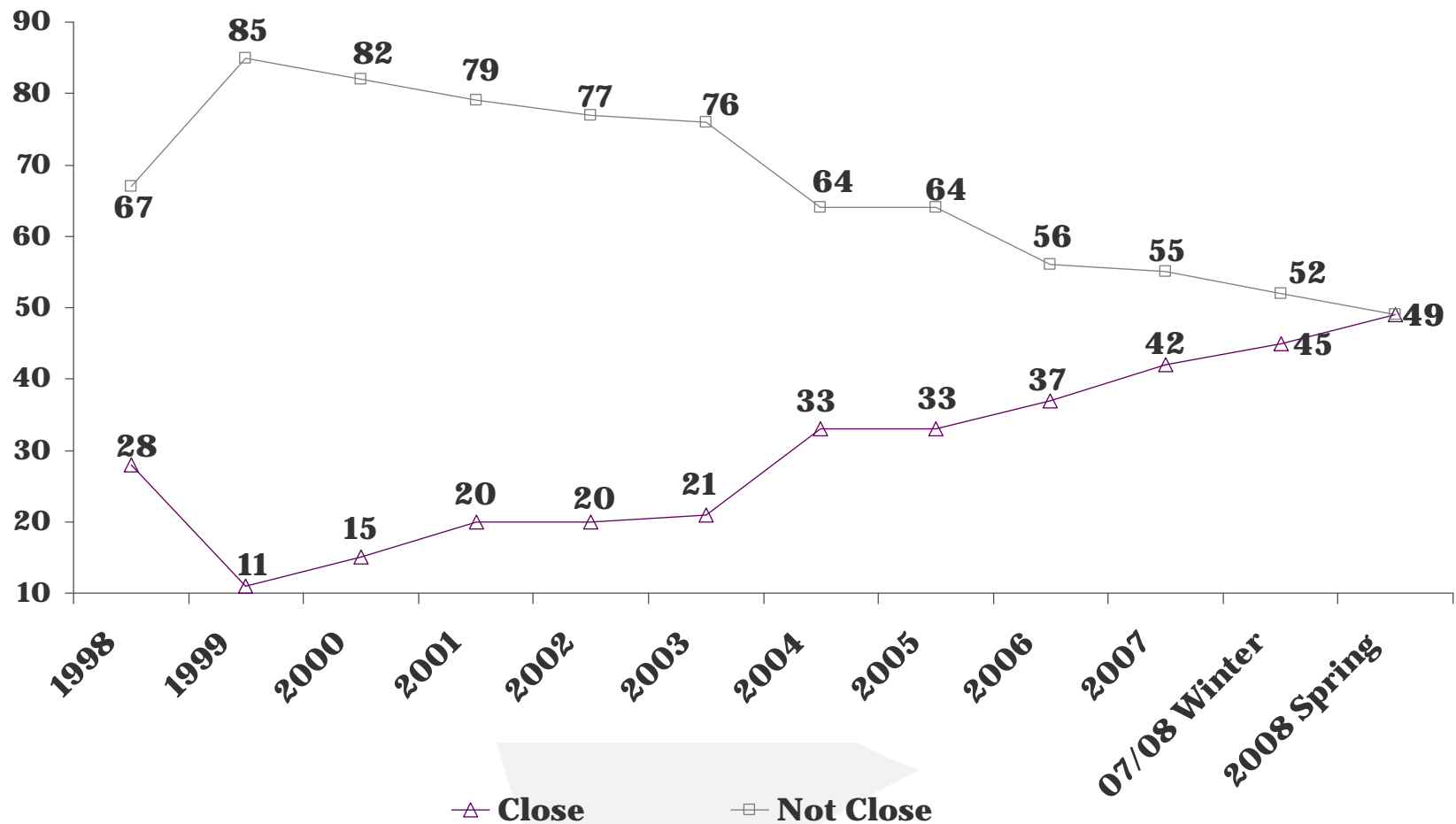




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Views Close to Your Own: Federal Government – Tracking

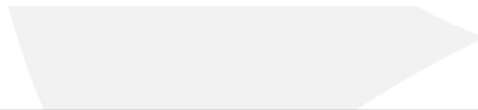
Are the views of the Federal Government very close, somewhat close, not very close or not close at all to your own?





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Who Supports The CWB and Why

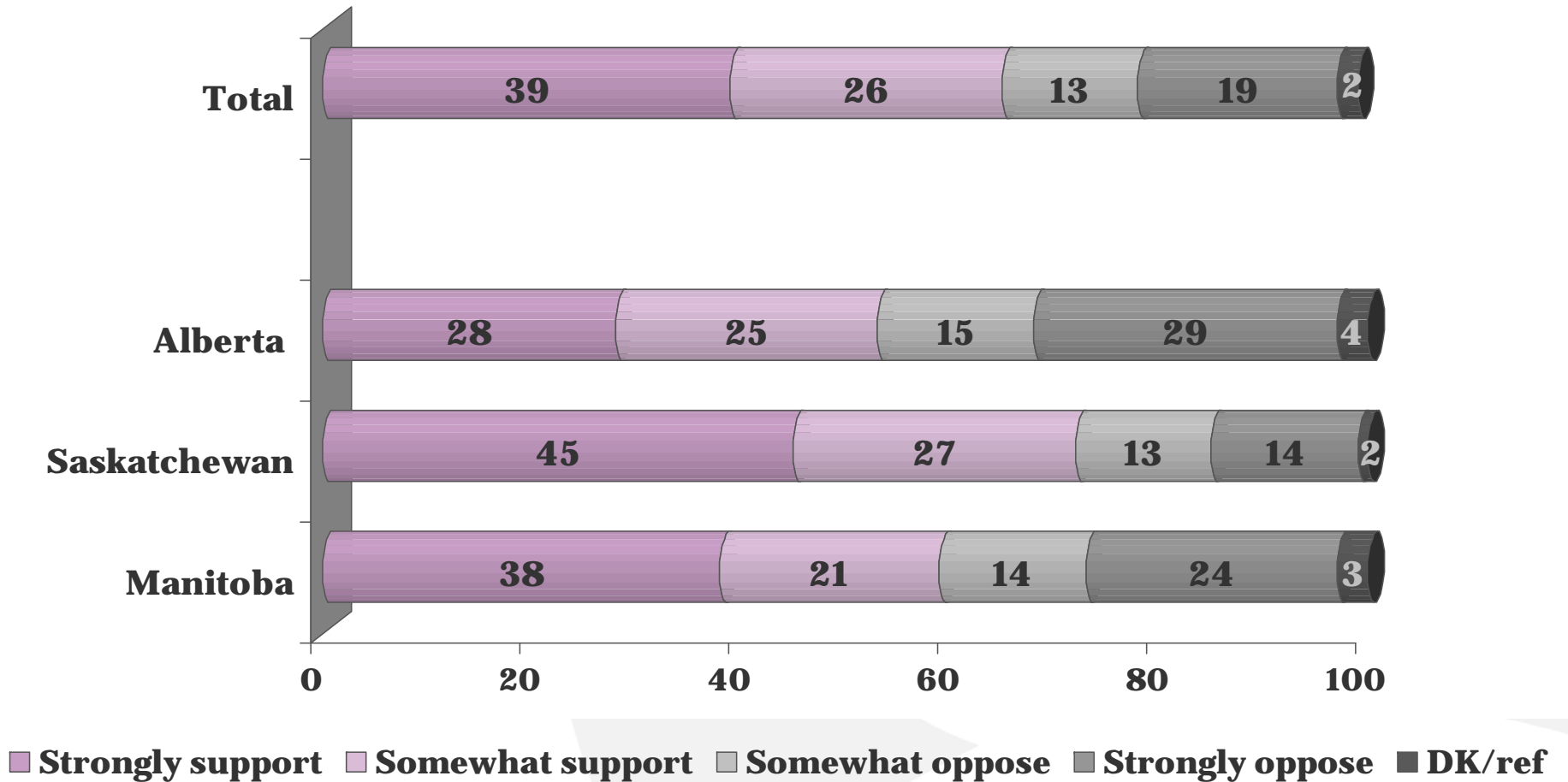




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Support or Oppose CWB

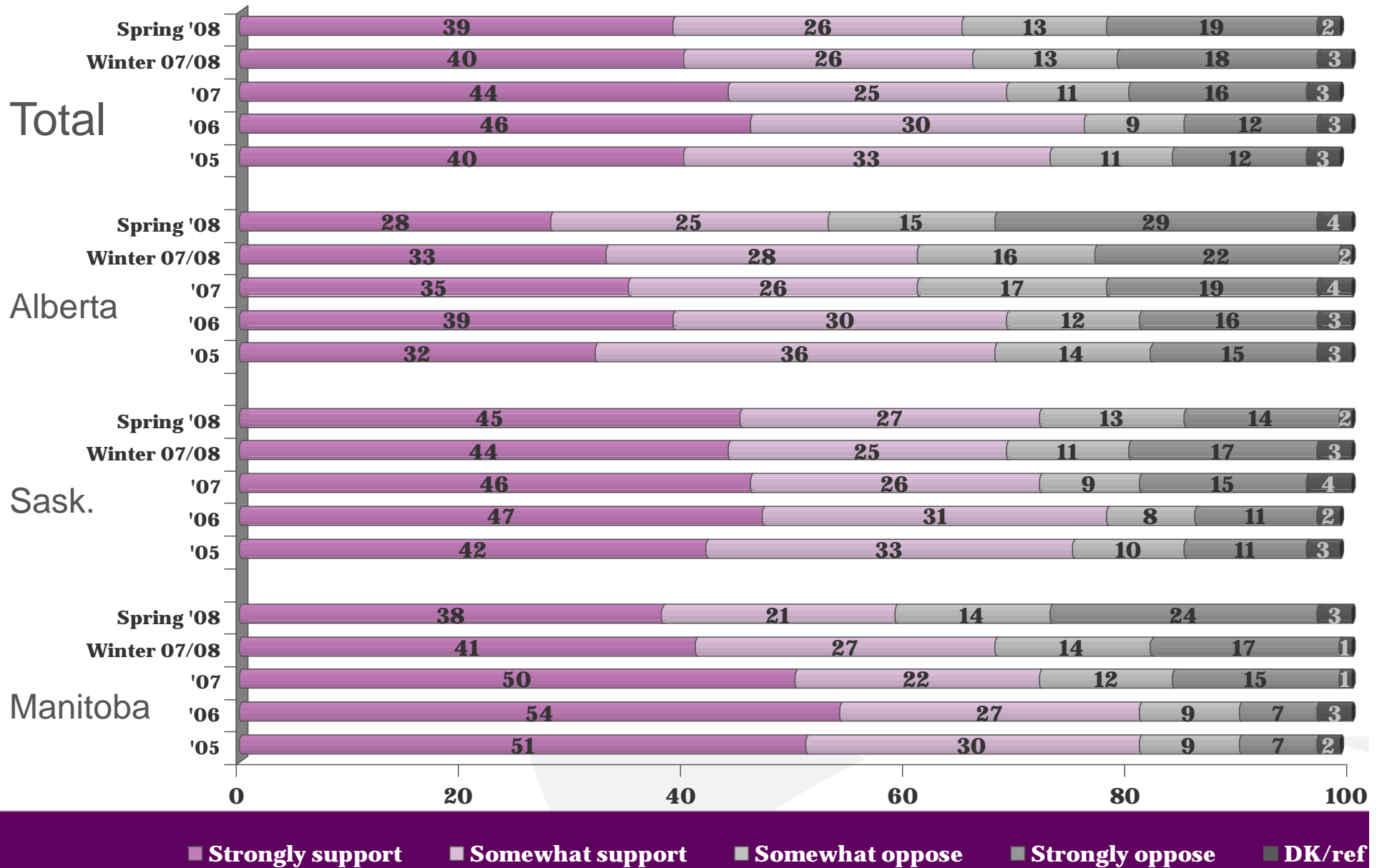
Do you support or oppose the Canadian Wheat Board?





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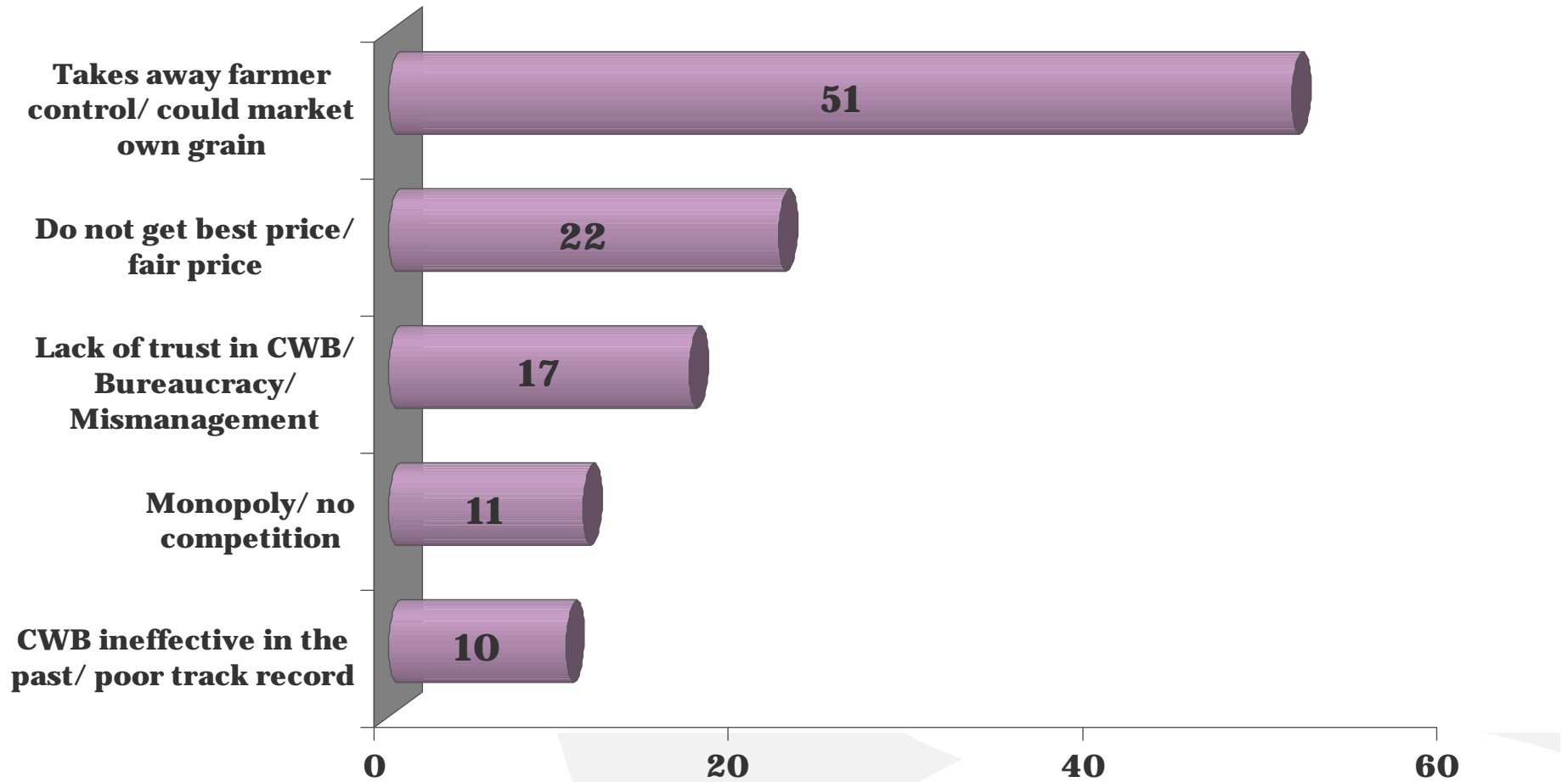
Support or Oppose CWB: Tracking





Reasons for Opposing the CWB

Why do you oppose the CWB? Those who answered “somewhat oppose” or “strongly oppose” to the question about whether or not they support the CWB (n=425)



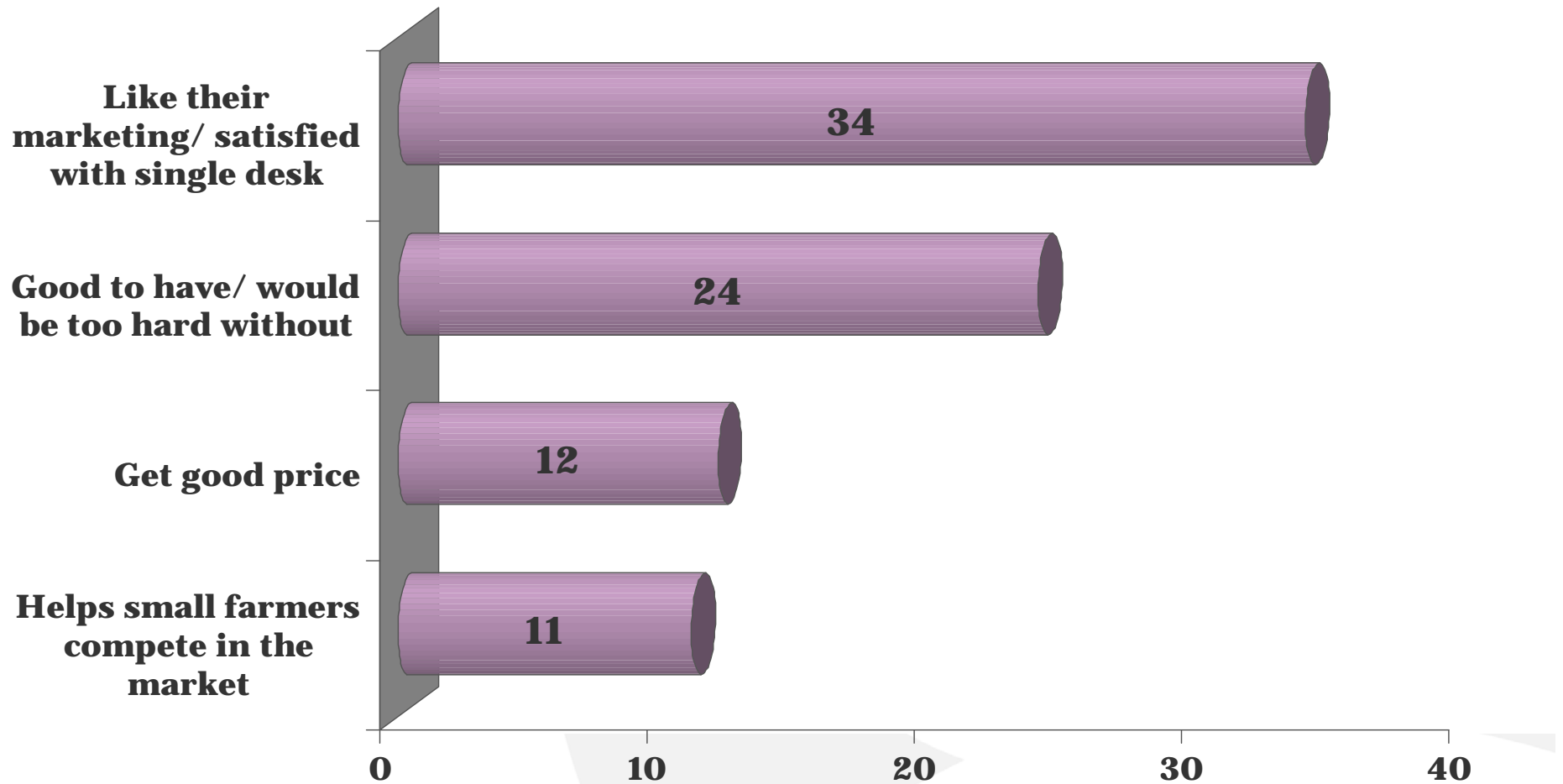
- Respondents were allowed more than one answer, so total responses=>100%
- Only displaying responses with 10+%



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Reasons for Supporting the CWB

Why do you support the CWB? Those who answered “somewhat support” or “strongly support” to the question about whether or not they support the CWB (n=840)



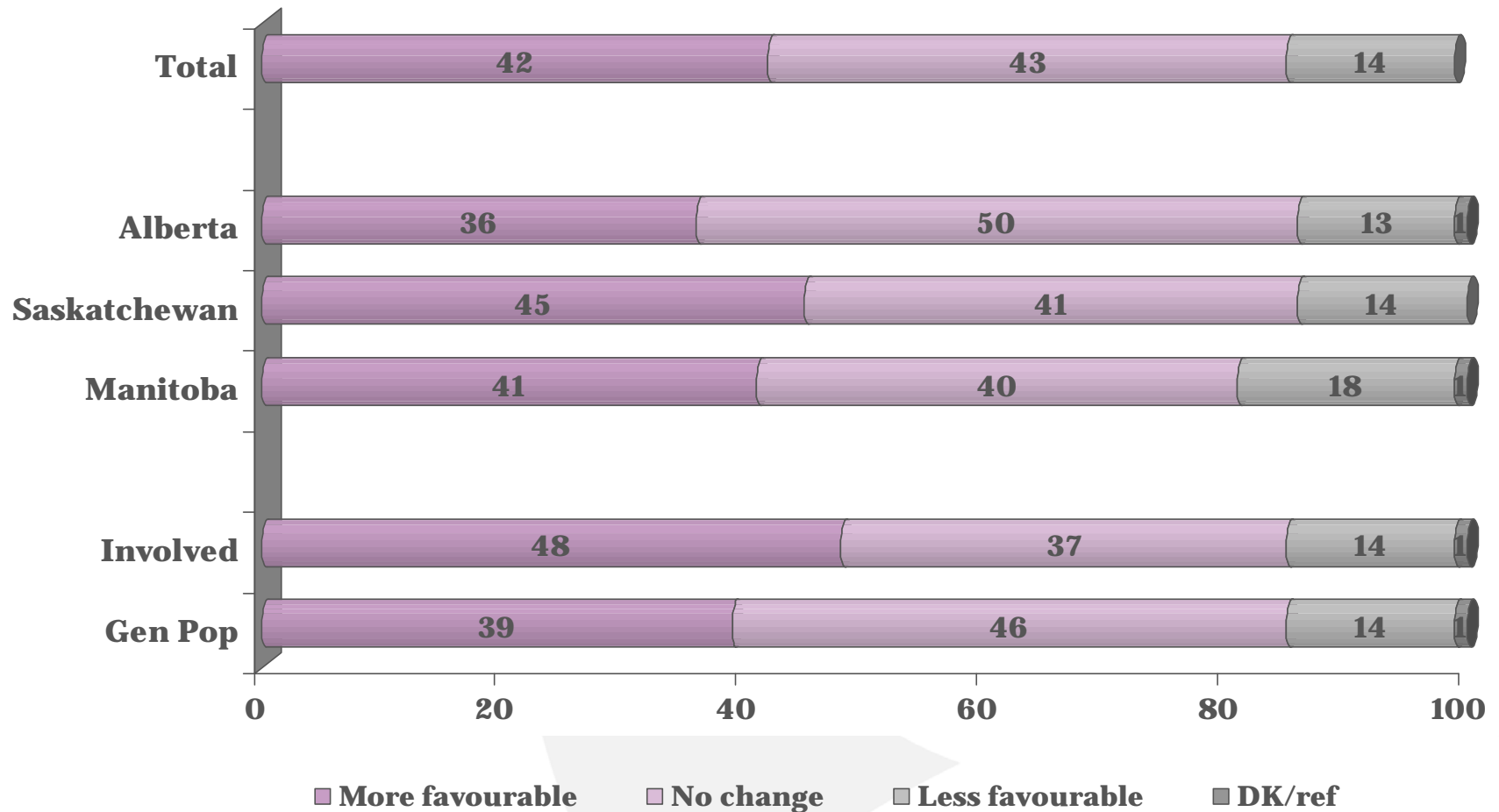
- Respondents were allowed more than one answer, so total responses=>100%
- Only displaying responses with 10+%



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Impression of CWB

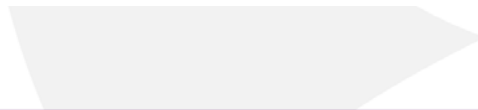
Which of the following best describes your impression of the Canadian Wheat Board compared to two years ago?





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The Single Desk Question

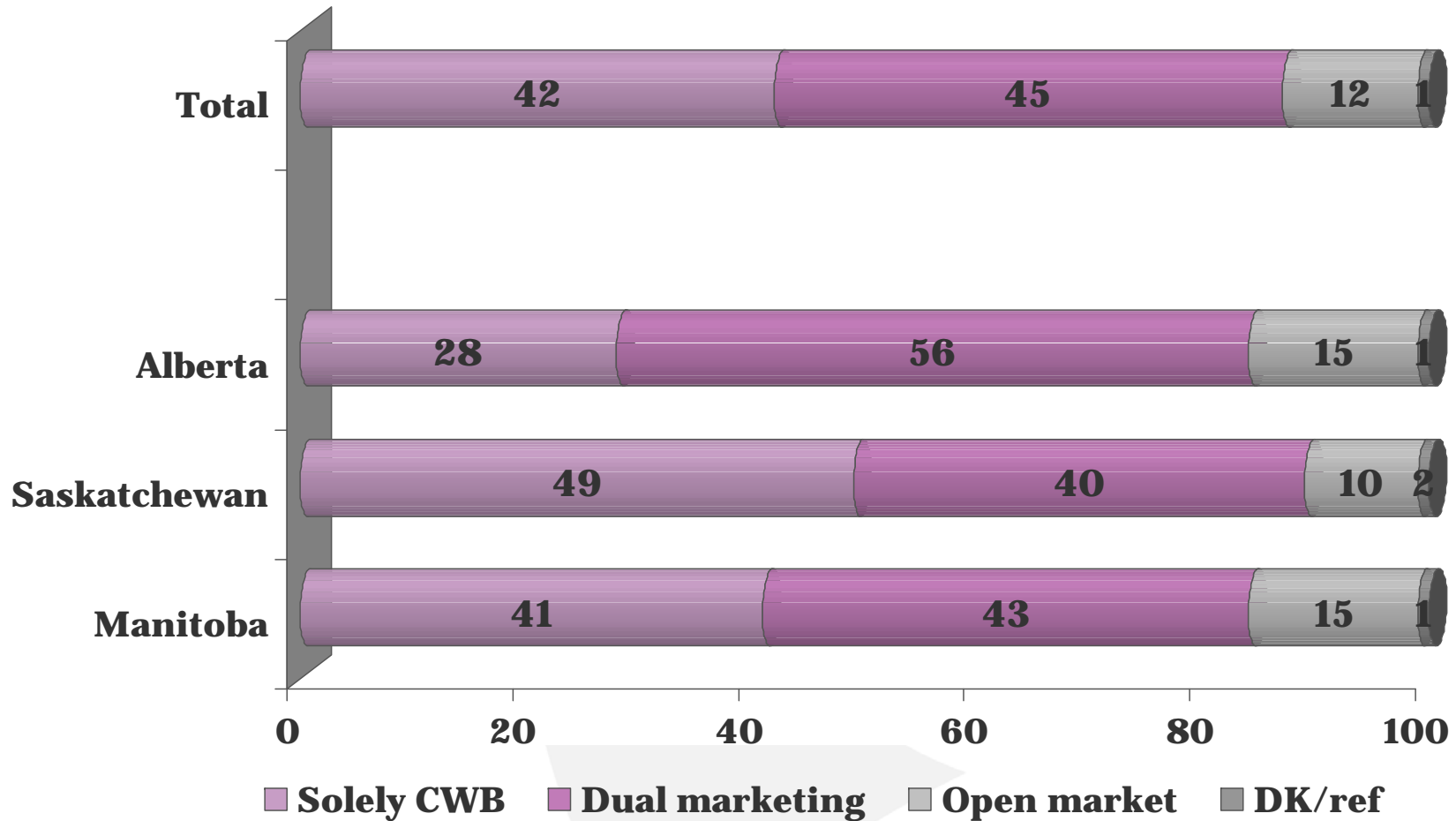




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Approaches to Marketing Wheat

If you had to choose between three different approaches to marketing wheat, which of the following would you prefer?

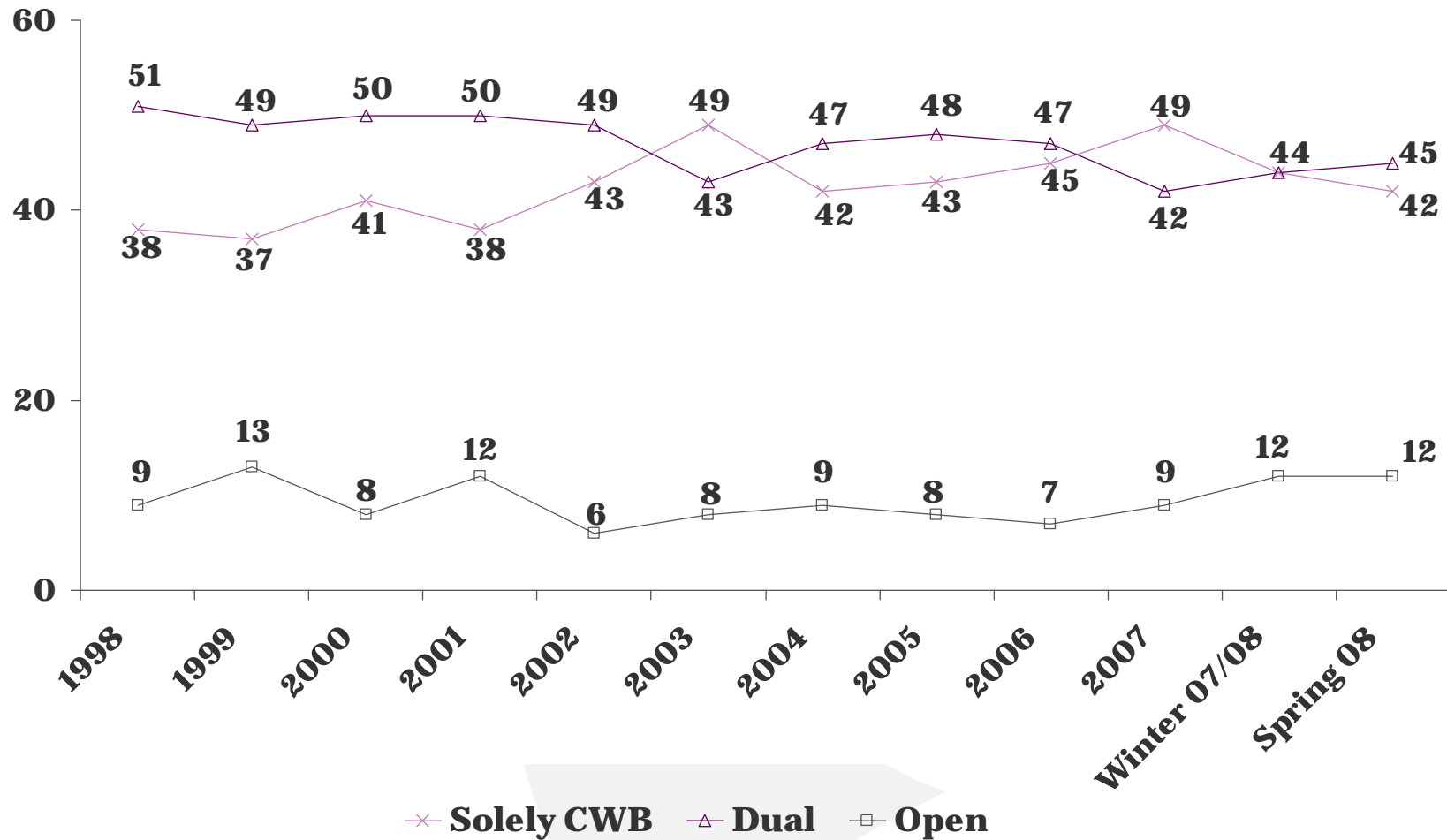




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Approaches to Marketing Wheat – Tracking

If you had to choose between three different approaches to marketing wheat, which of the following would you prefer?

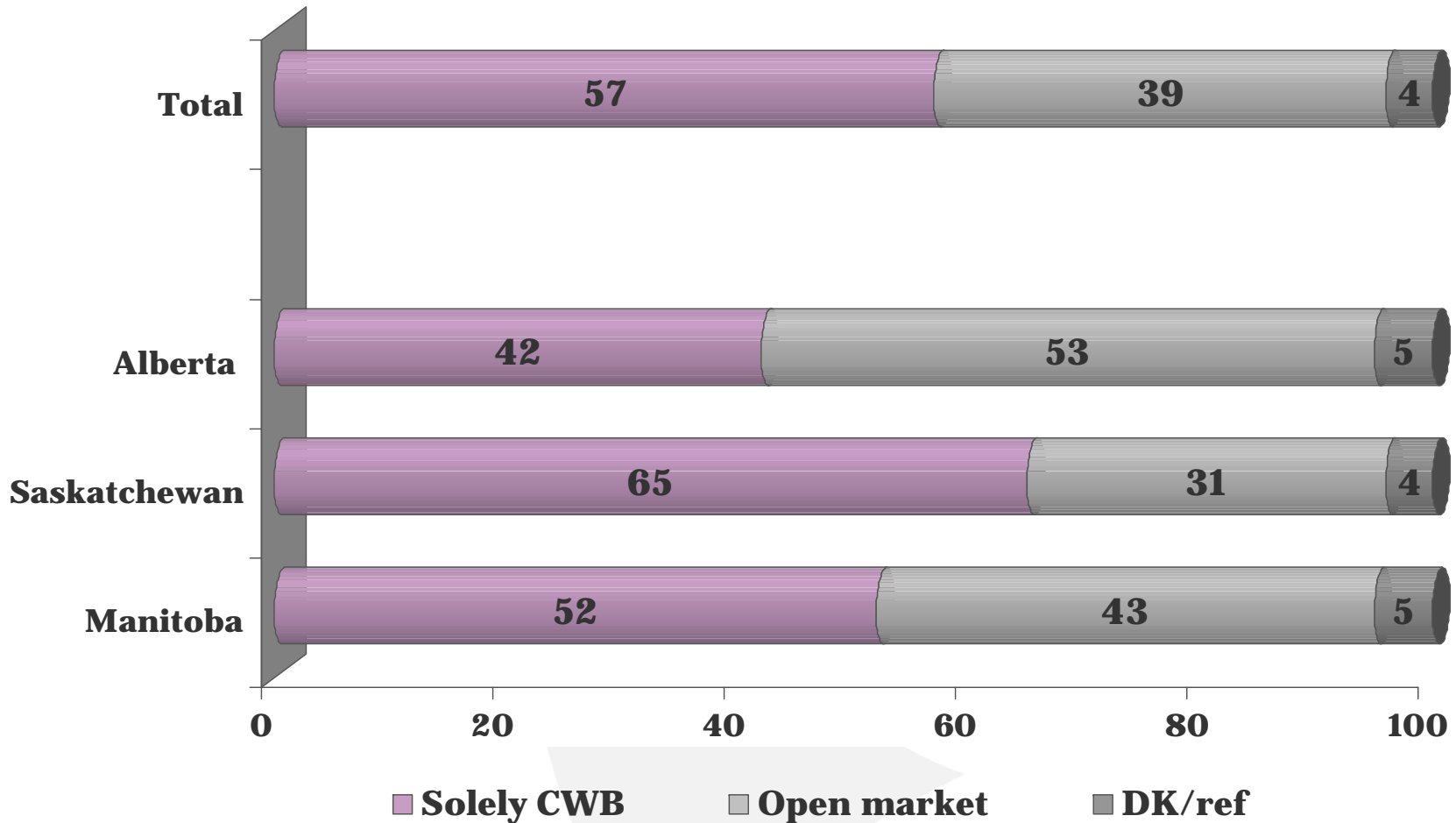




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Options For Wheat Marketing

If you had to choose between the following two options for wheat marketing, which one would you prefer?

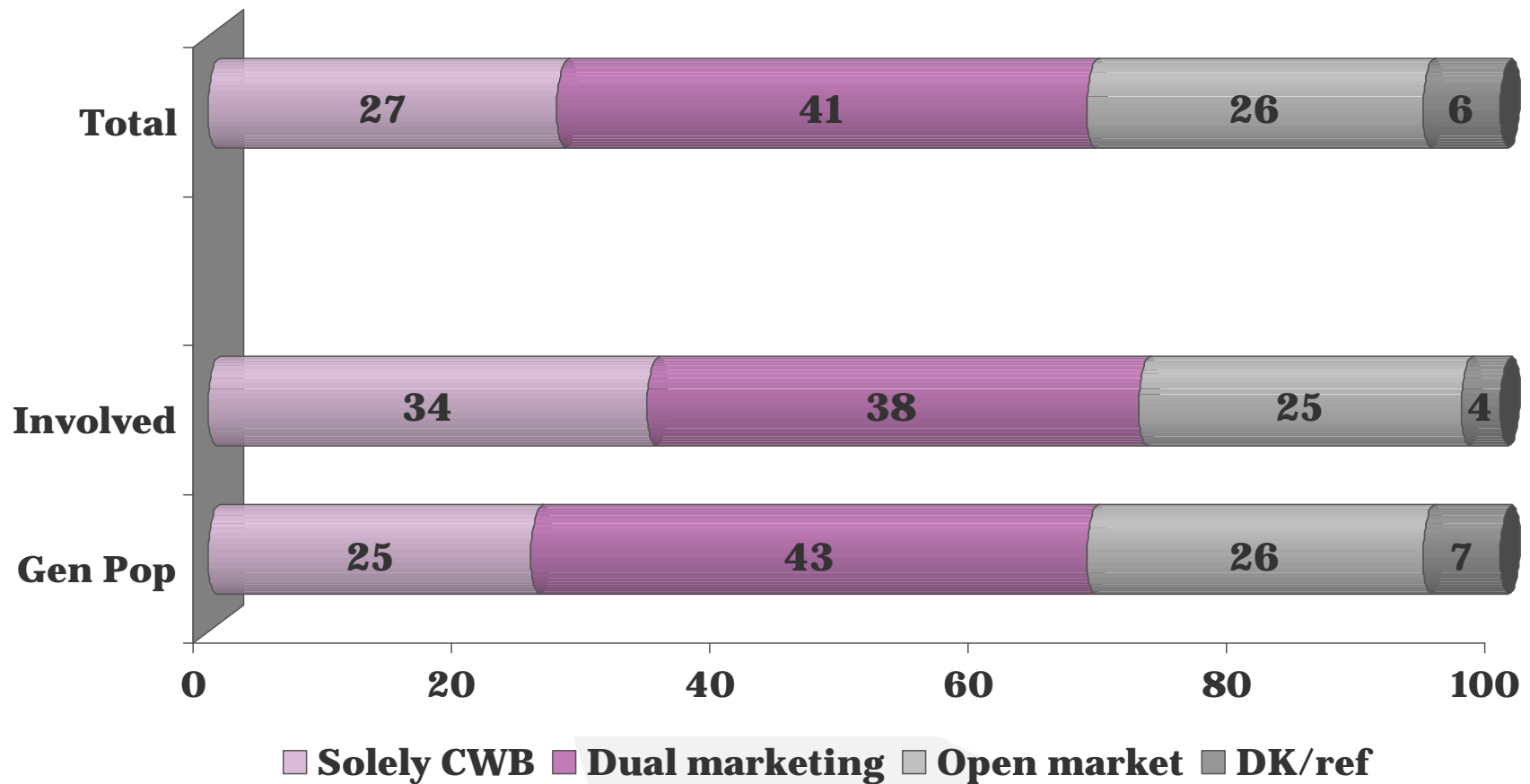




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Options For Barley Marketing

If you had to choose between three different approaches to marketing barley, which of the following would you prefer?

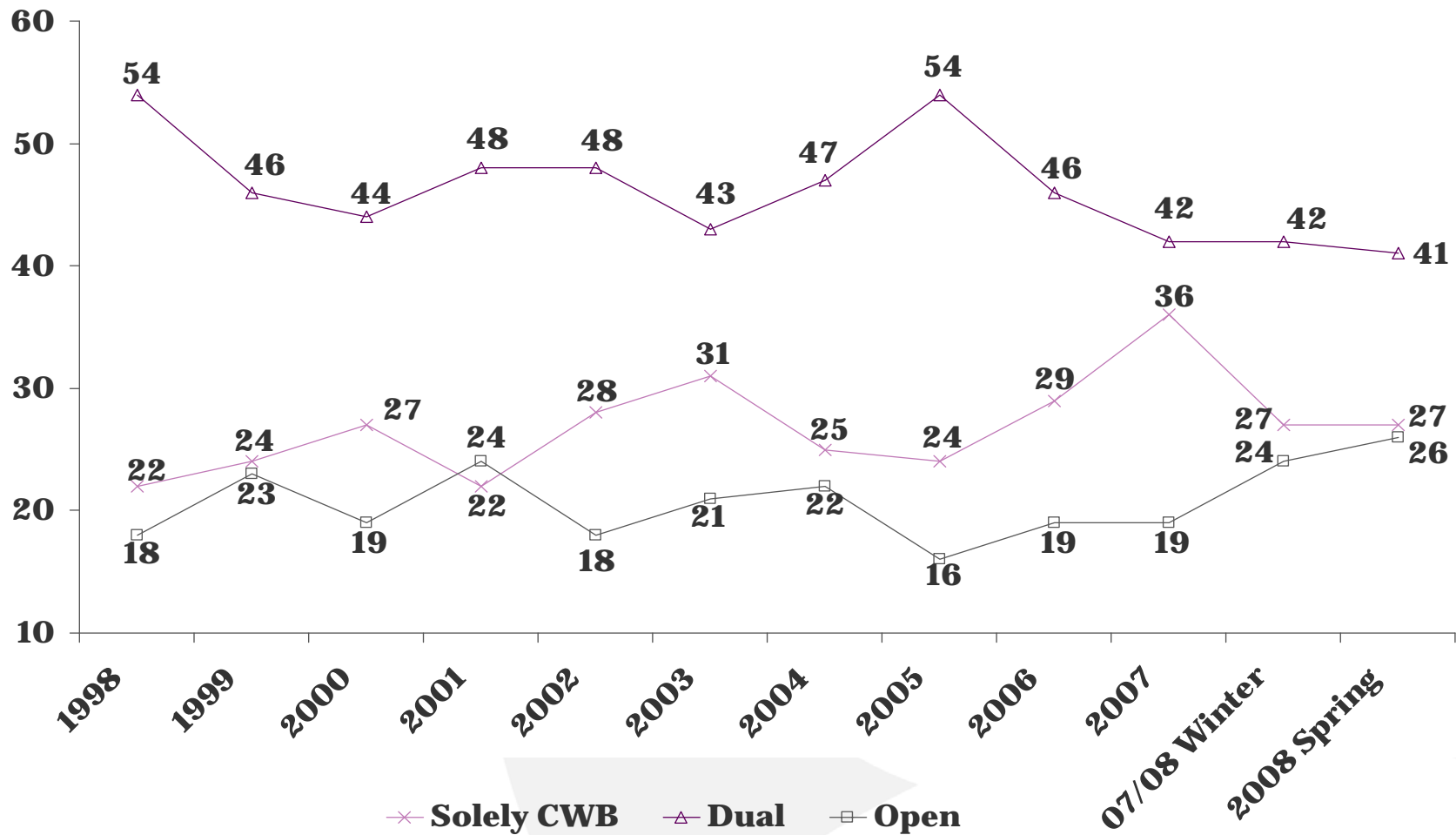




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Approaches to Marketing Barley – Tracking

If you had to choose between three different approaches to marketing barley, which of the following would you prefer?

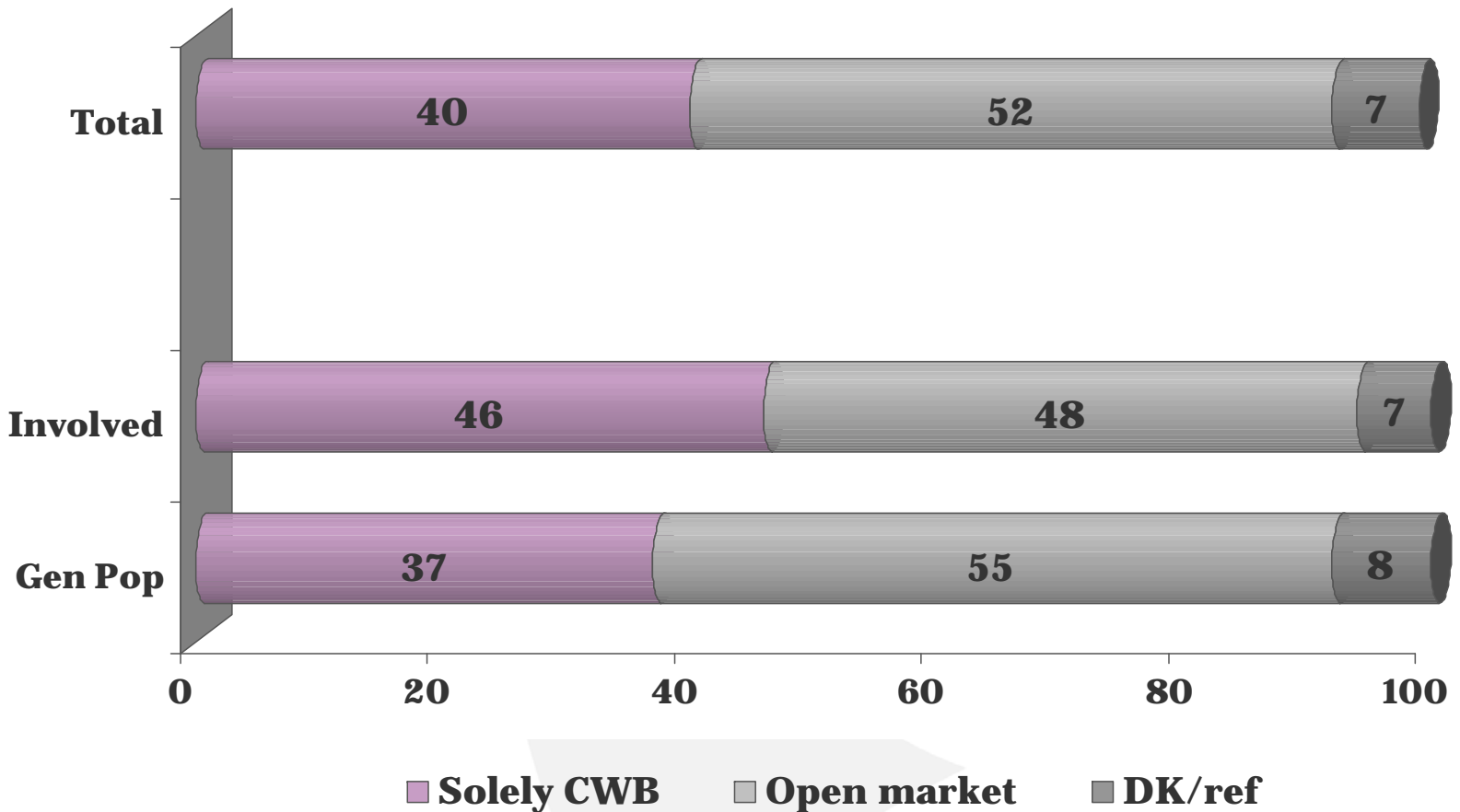




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Options For Barley Marketing

If you had to choose between the following two options for barley marketing, which one would you prefer?

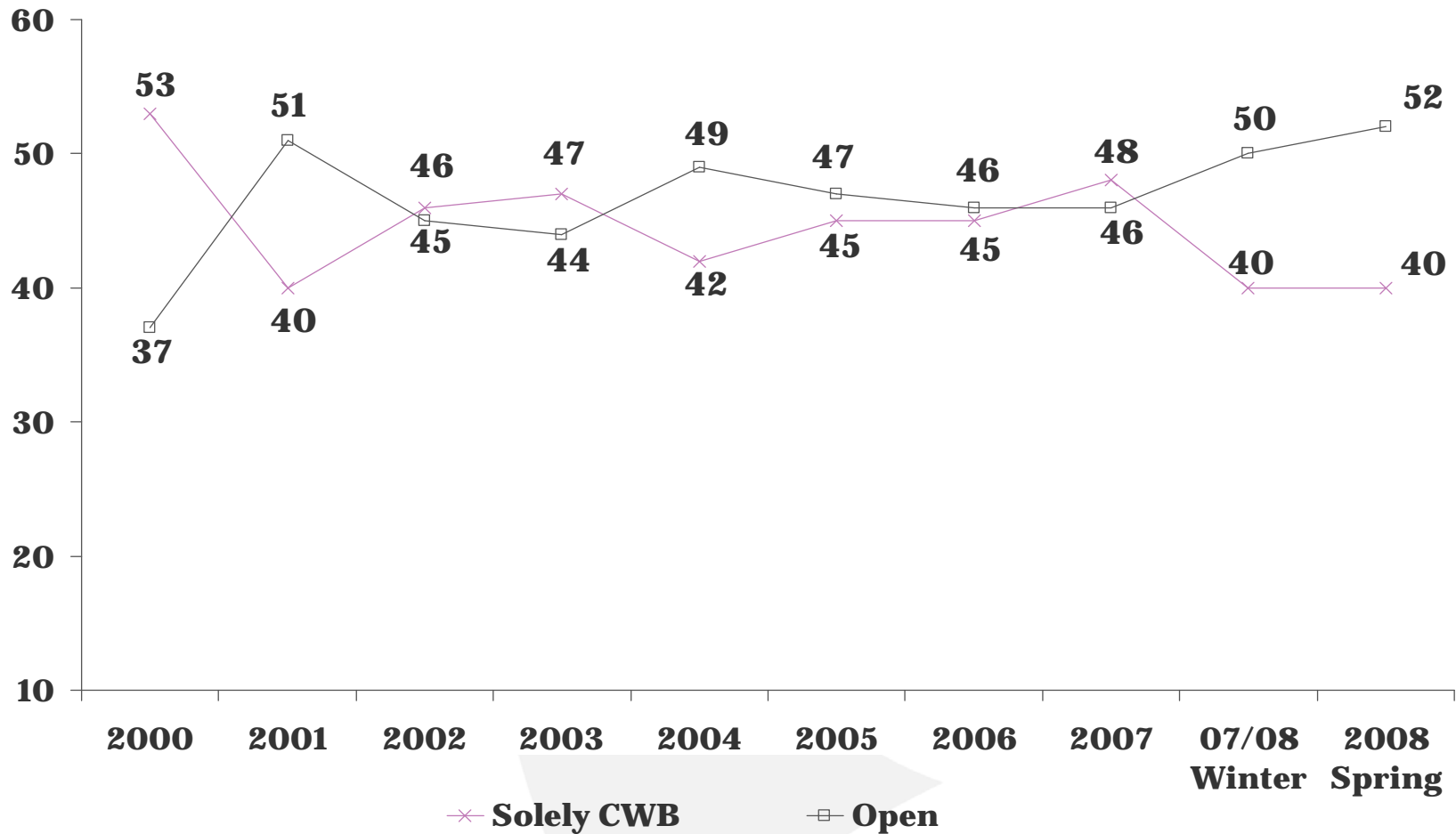




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Approaches to Marketing Barley – Tracking

If you had to choose between two different approaches to marketing barley, which of the following would you prefer?

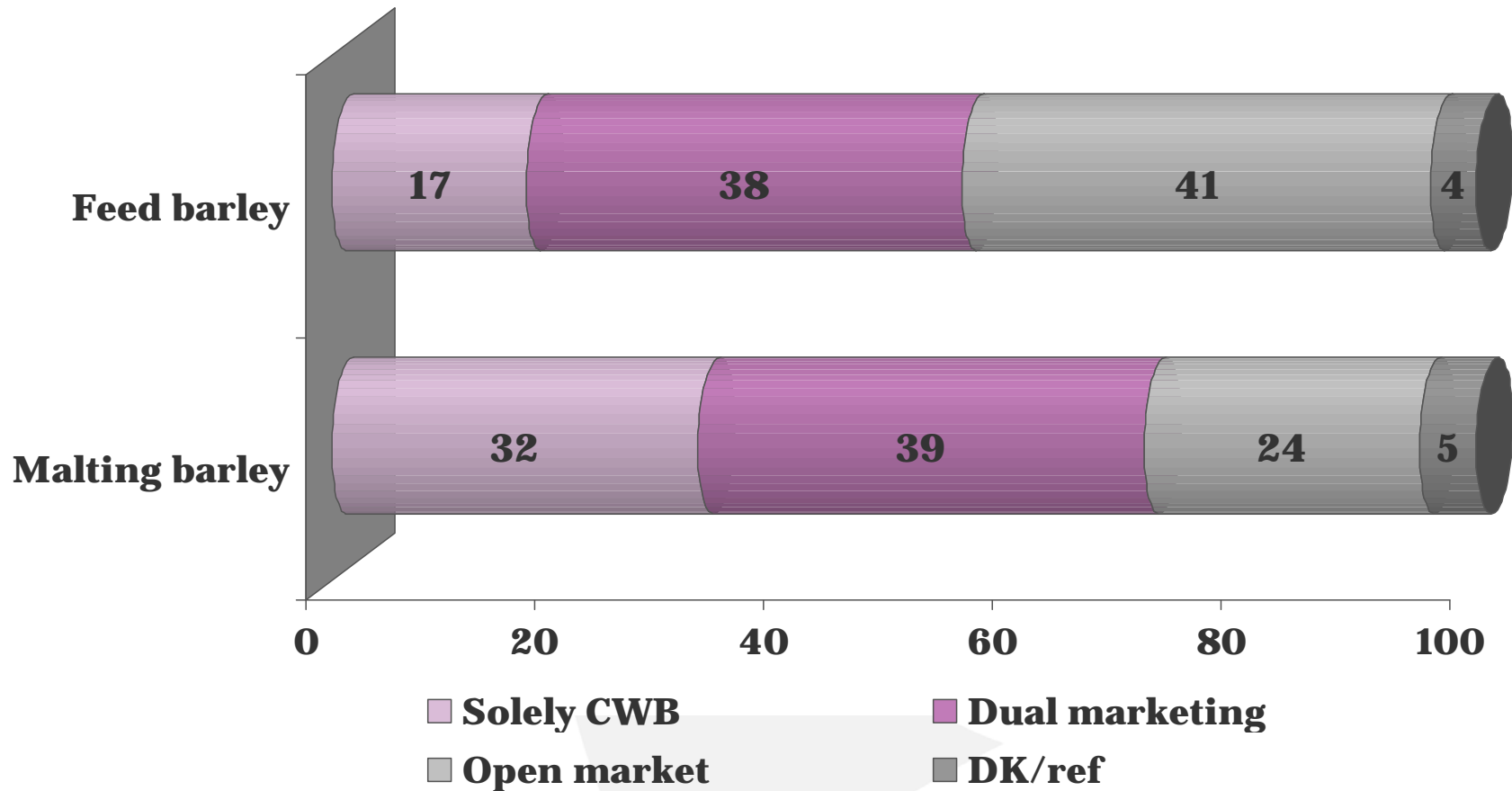




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Feed Barley and Malting Barley: Options For Marketing

If you had to choose between three different approaches to marketing barley, which of the following would you prefer?

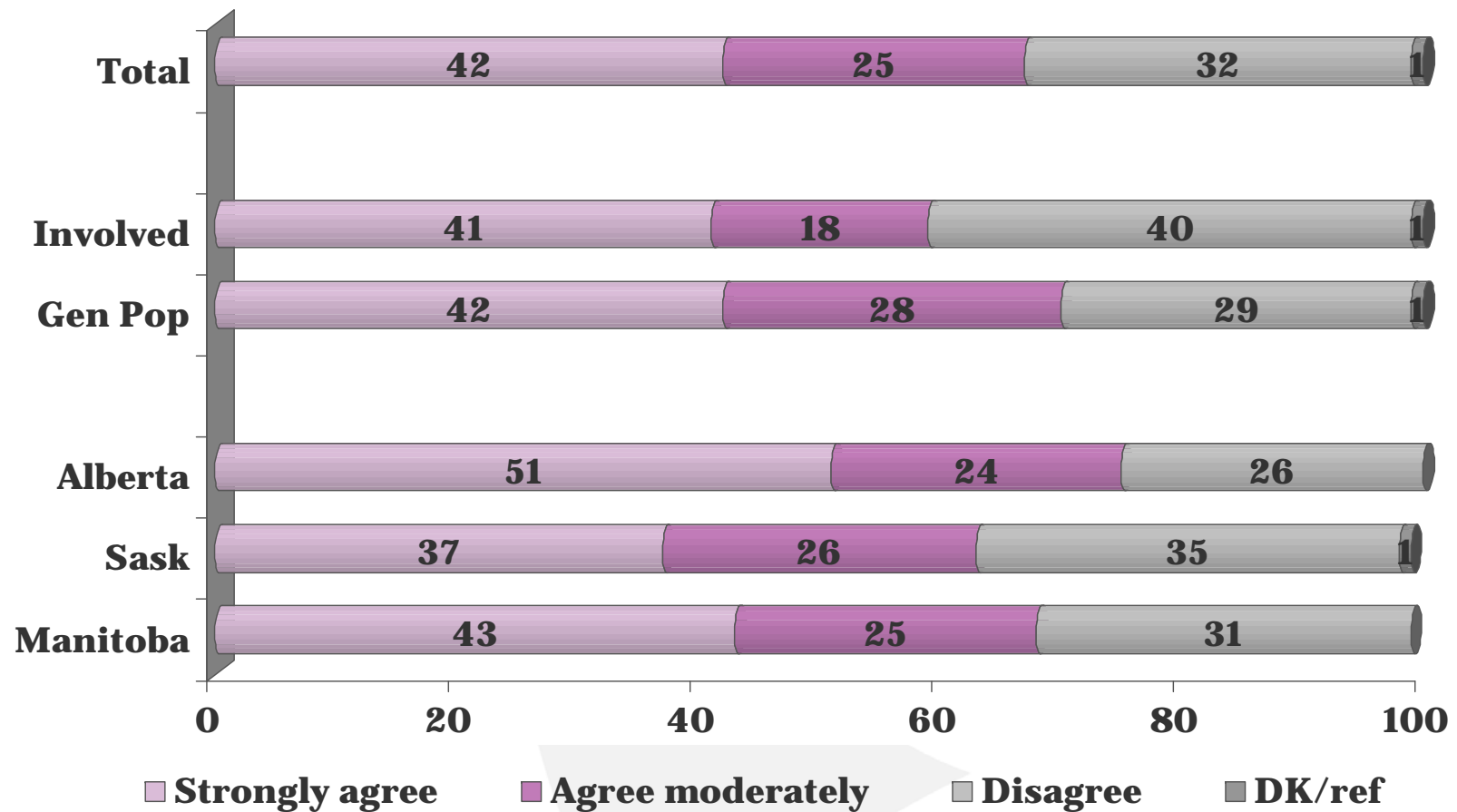




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Agreement – CWB Shouldn't Have Trouble Surviving if a Good Marketer

Agree/disagree: If the CWB is a good marketer of wheat and barley, it should have no trouble surviving in a dual market environment?

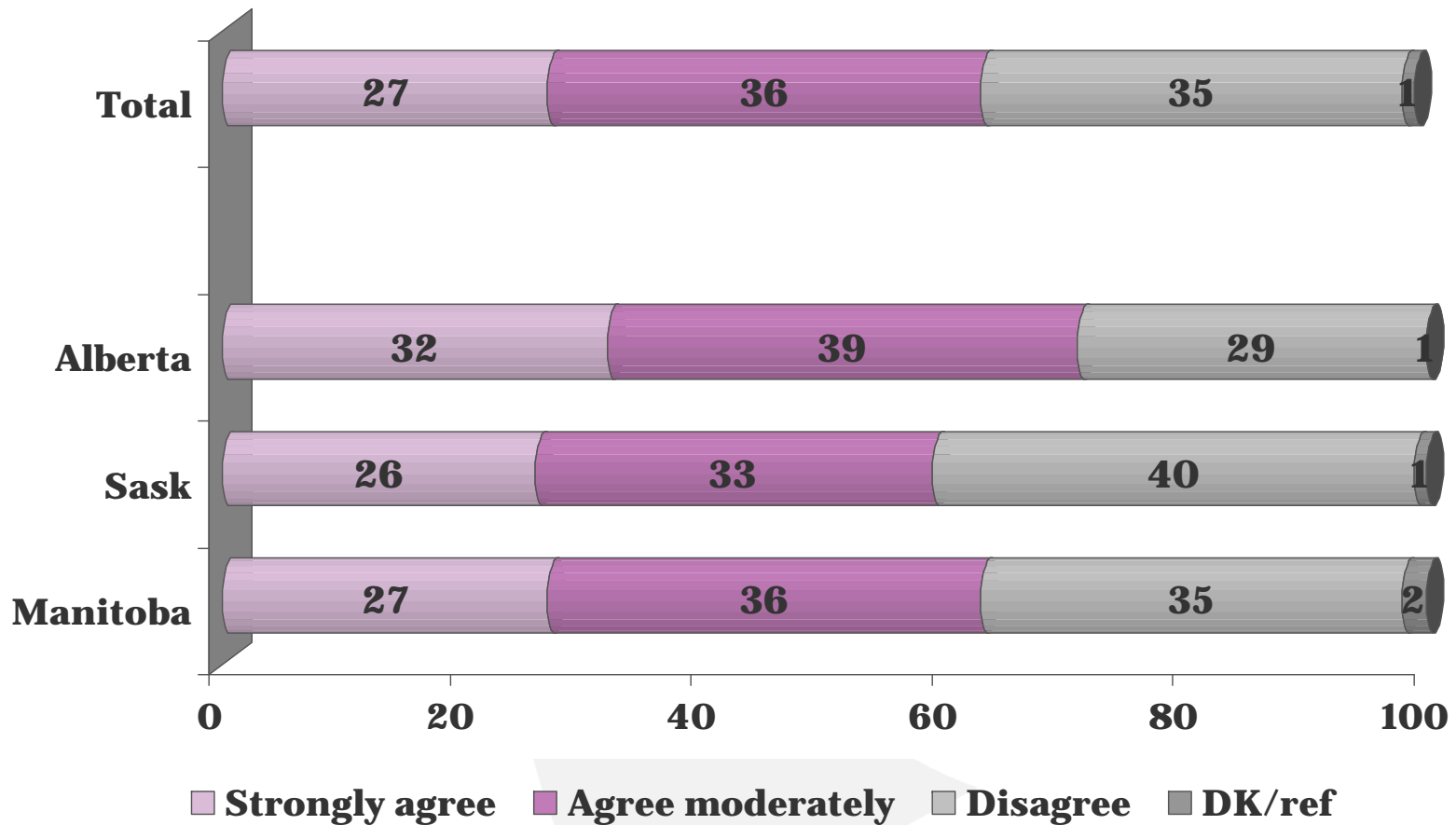




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Agreement – CWB Would Service Dual Market As Well as it Does Now

Agree/disagree: In a dual market, the CWB would be able to service those who want to use it as well as it does now?

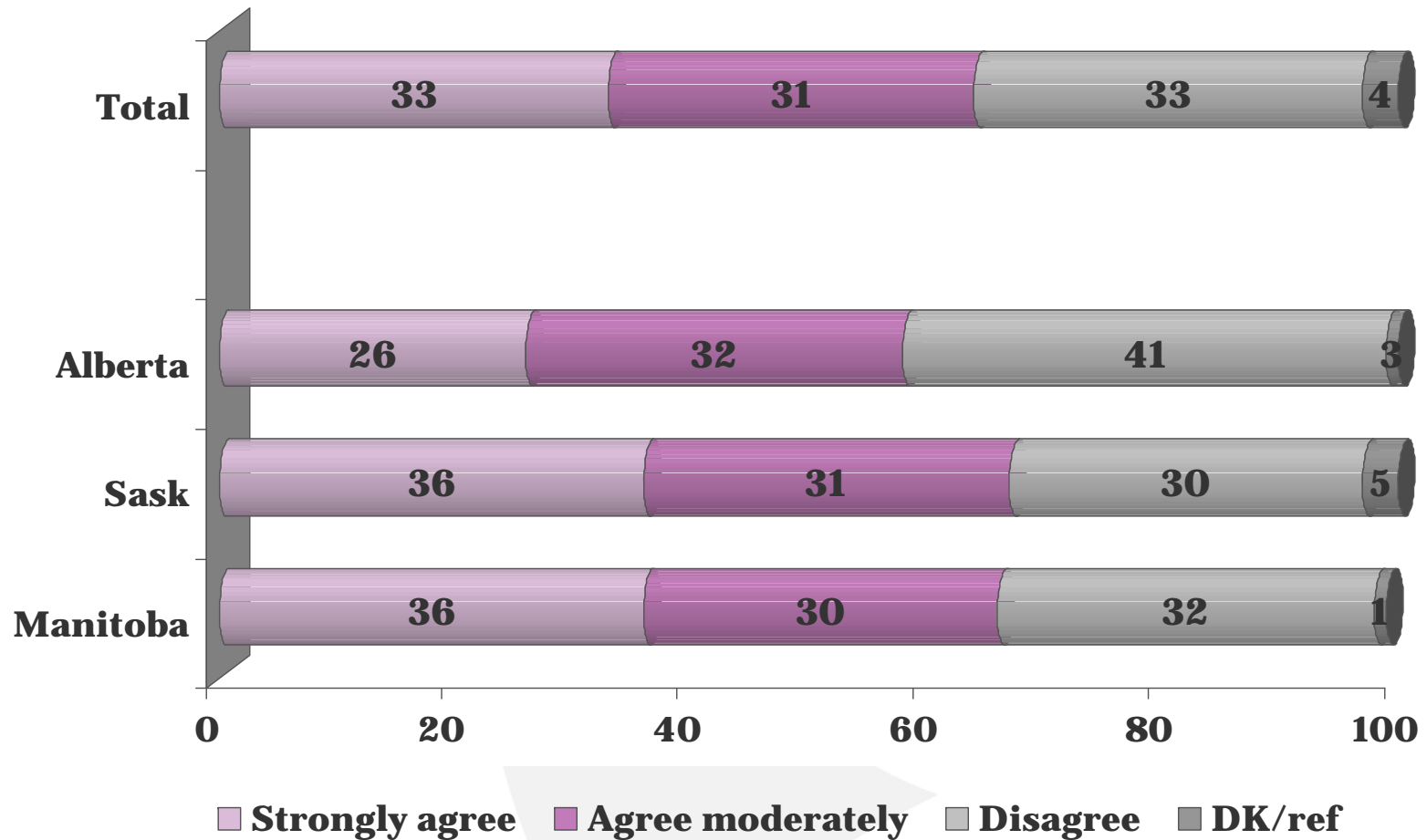




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Agreement – Impossible for CWB to Compete with Private Grain Companies

Agree/disagree: Since the CWB owns no terminals or elevators it would be impossible for the CWB to compete on a level playing field with the private grain companies

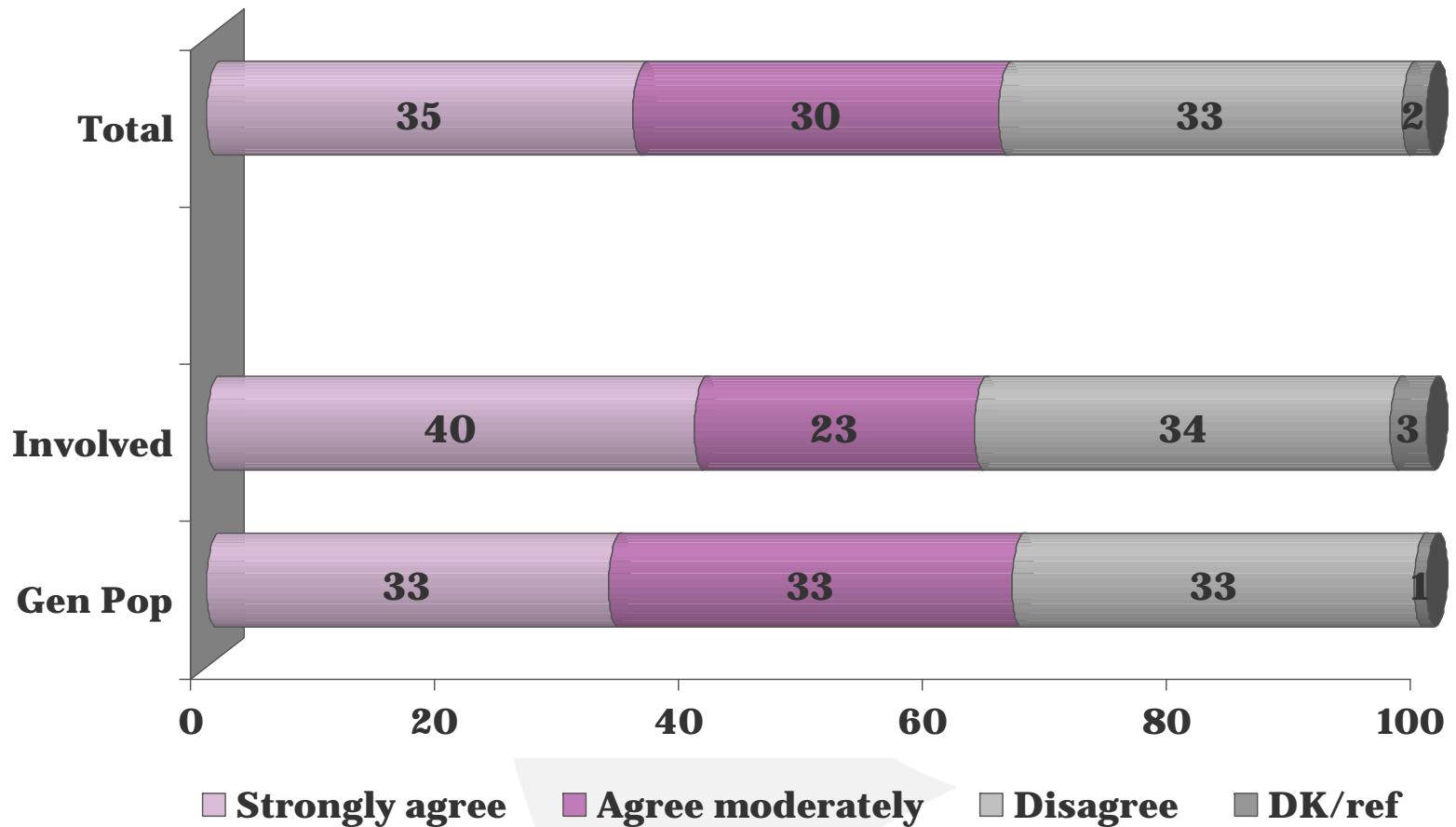




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Agreement – Better Prices Because of Monopoly

Agree/disagree: The reason that the CWB is able to get better prices than private grain companies could is because it has an international monopoly over the sale of Canadian wheat and barley

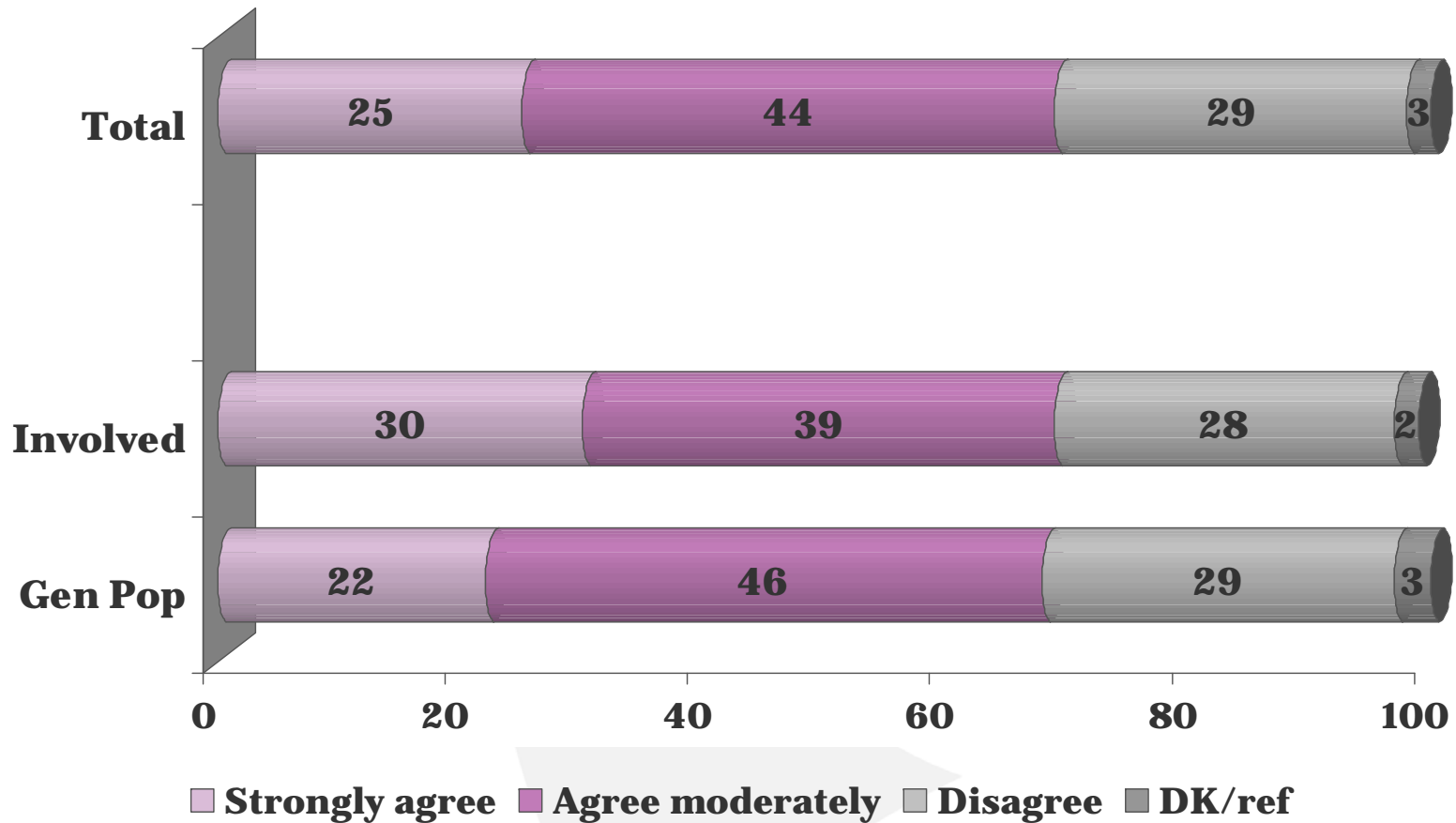




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Agreement – Same Benefits as a Dual Market

Agree/disagree: The more flexible pricing and delivery options the CWB has introduced in the past few years provide many of the benefits of a dual market

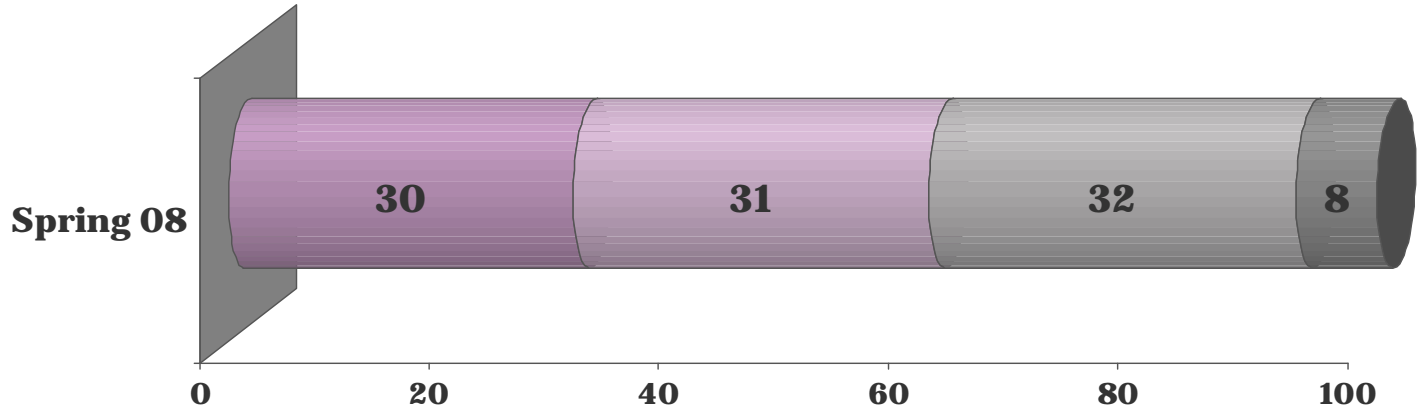




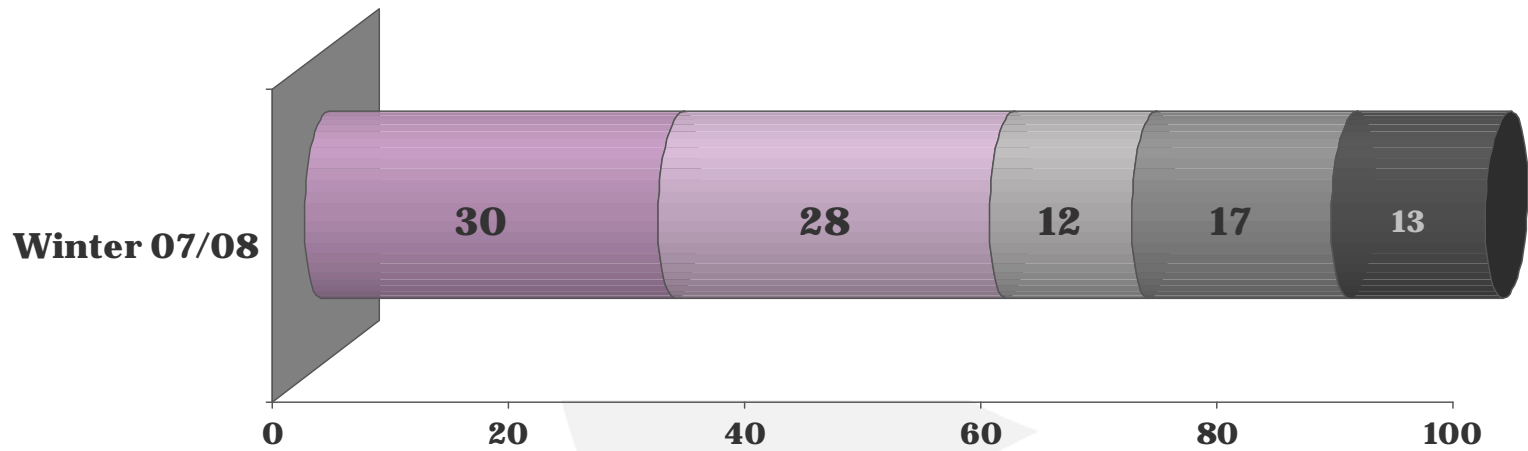
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Agreement – Barley Prices Went Up

Agree/disagree: Barley prices went up when the government tried to open up the barley market



Strongly agree Moderately agree Disagree DK/ref



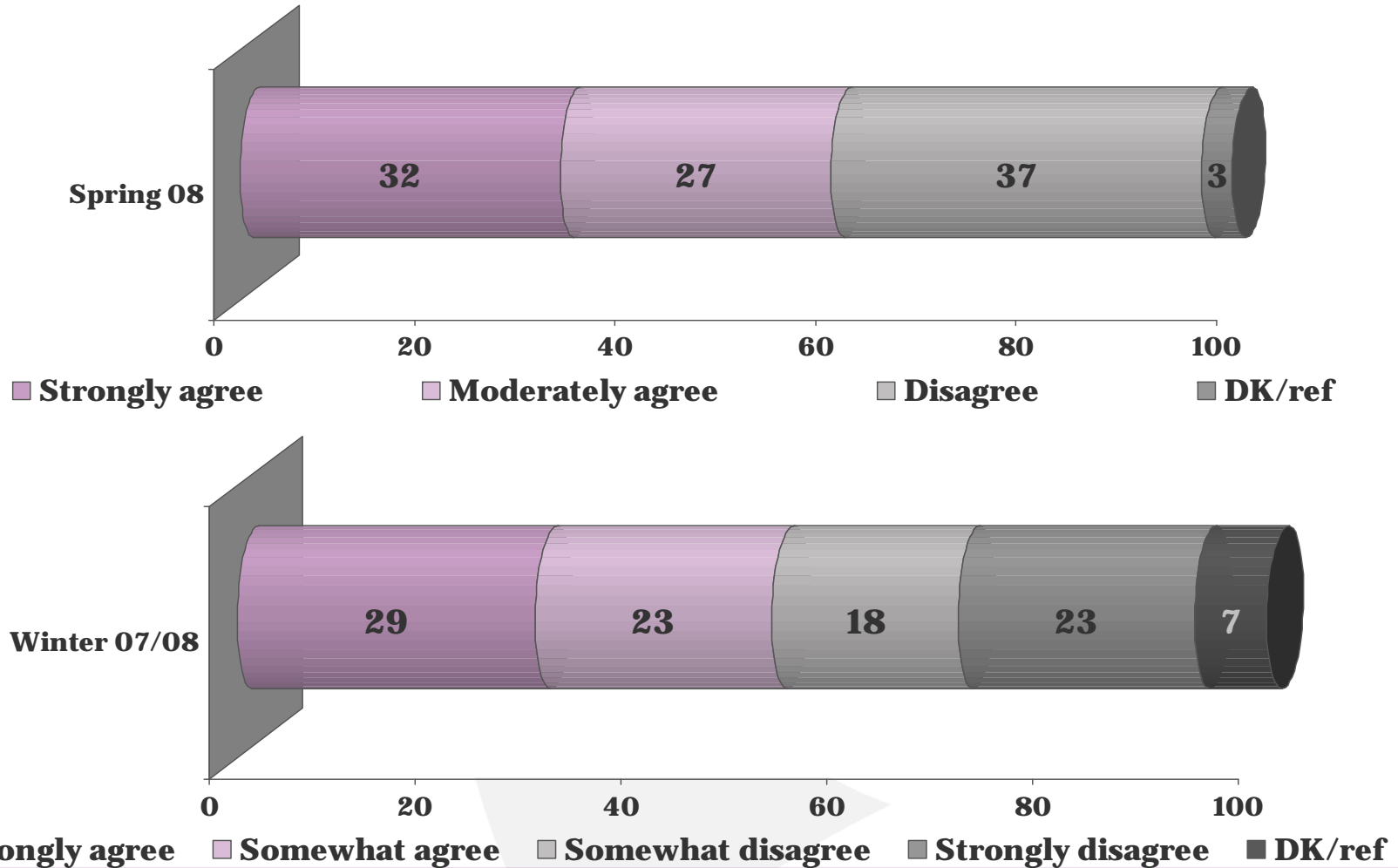
Strongly agree Somewhat agree Somewhat disagree Strongly disagree DK/ref



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Better Returns for Barley if Single Desk Eliminated: Tracking

Agree/disagree: Getting rid of the single desk for barley will result in better returns for barley producers

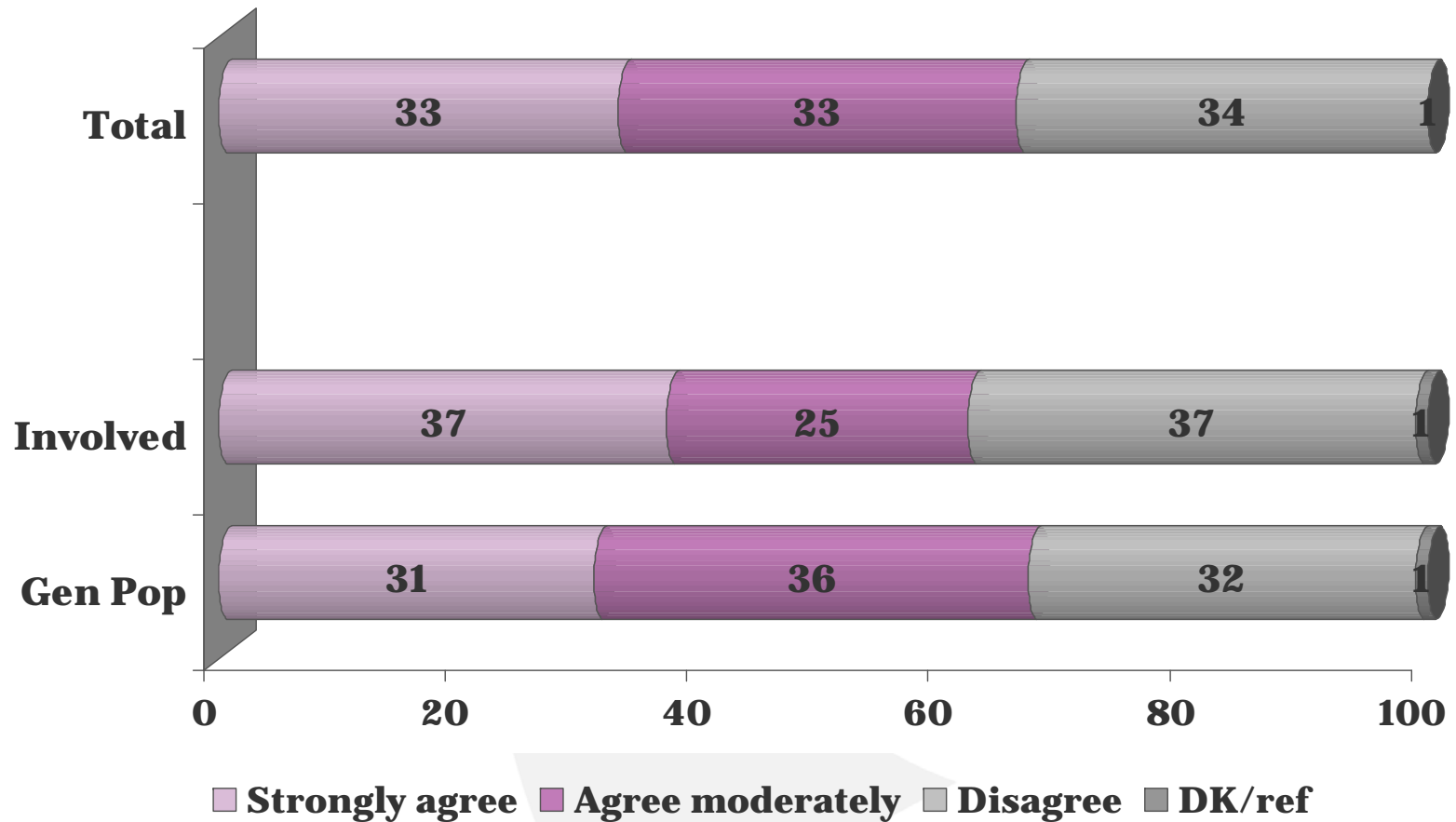




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Agreement – CWB Will Maximize Value

Agree/disagree: The CWB will maximize the value to you of this period of high wheat prices

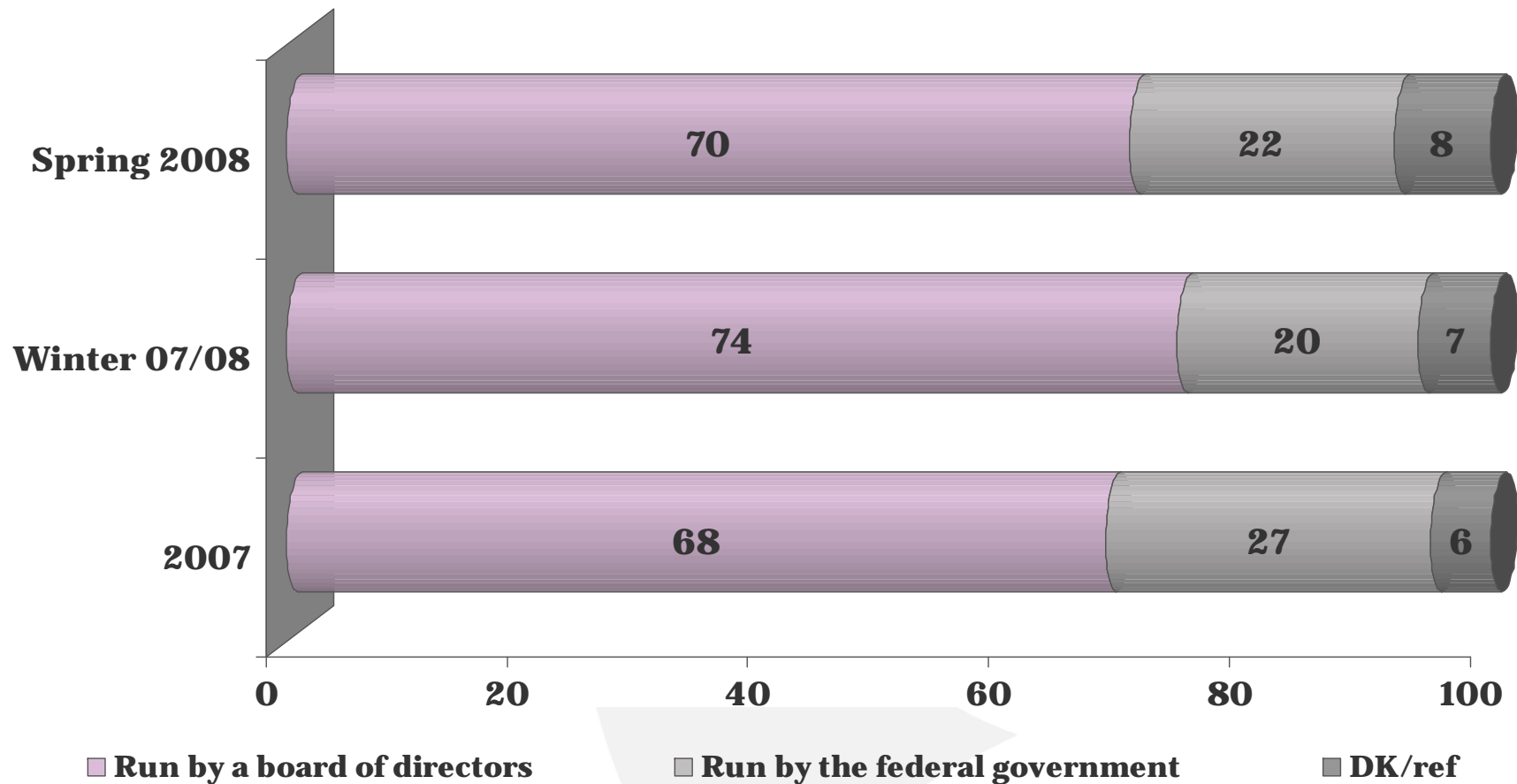




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CWB Run By: Tracking

As far as you are concerned, how does the CWB operate now – is the Canadian Wheat Board run by a board of directors or run by the federal government?

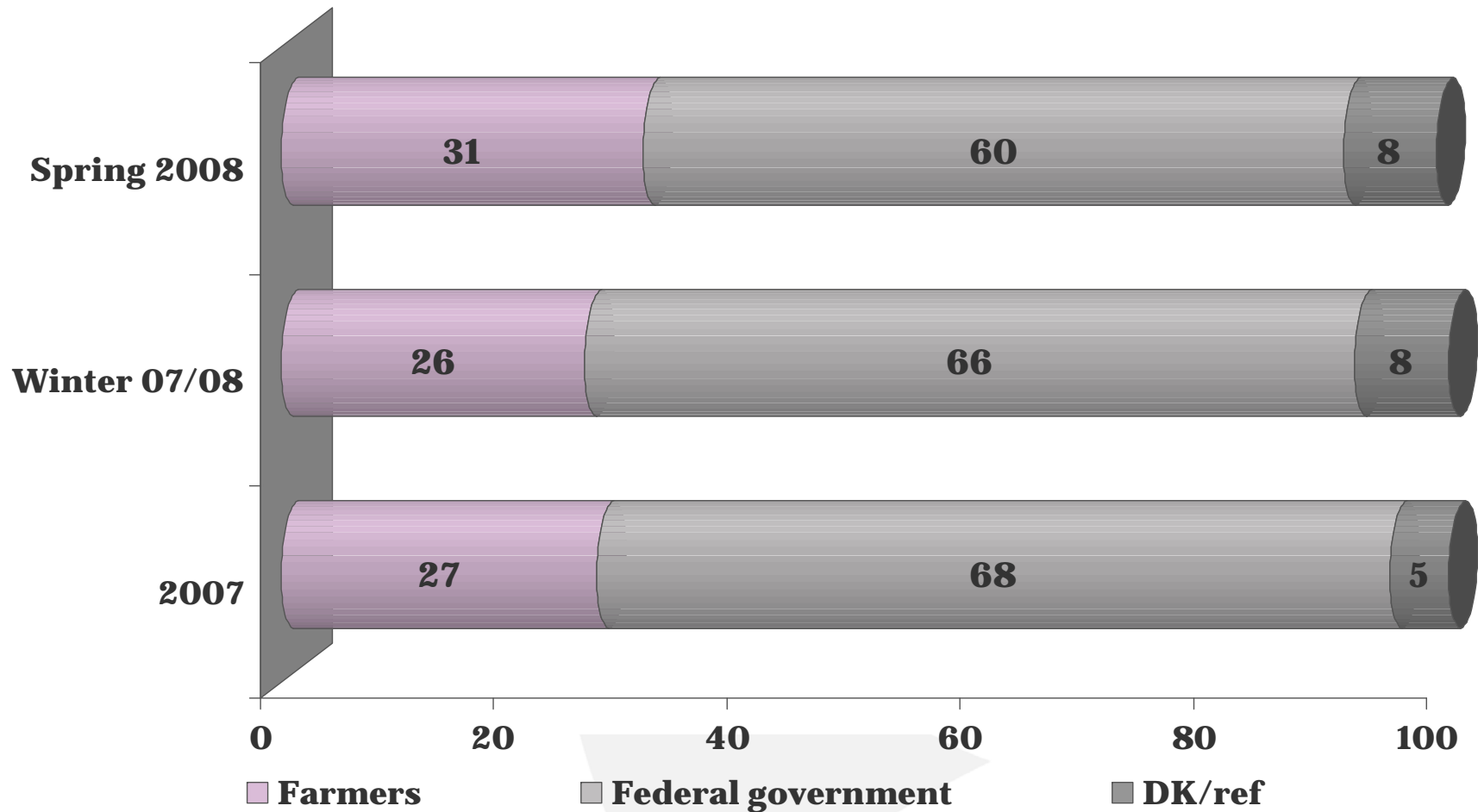




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Major Decisions at CWB

Who has more say over major decisions at the CWB – farmers or the federal government?

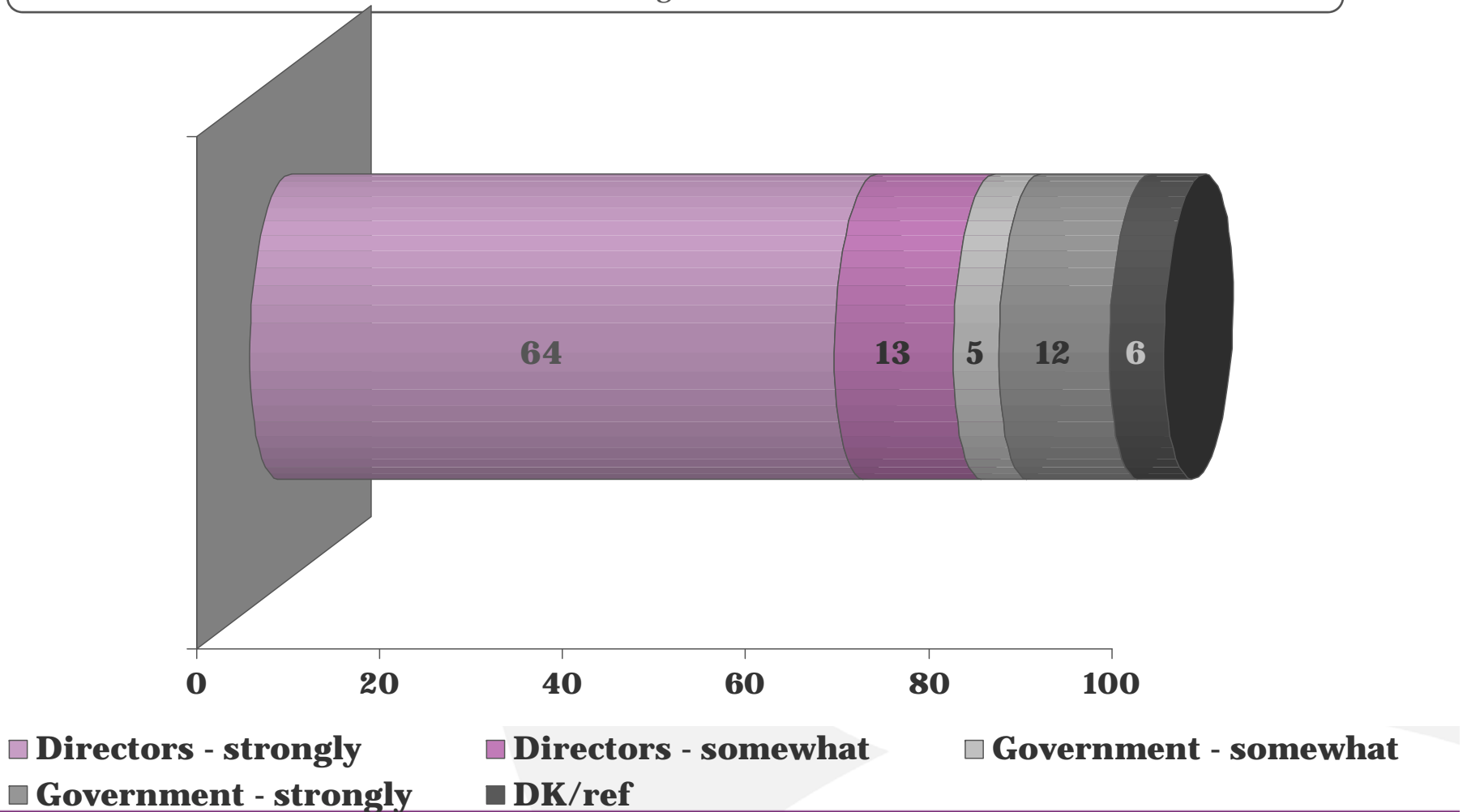




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Who Should Determine CWB's Future

Who should determine the future of the CWB – the farmer elected directors of the CWB or the federal government?

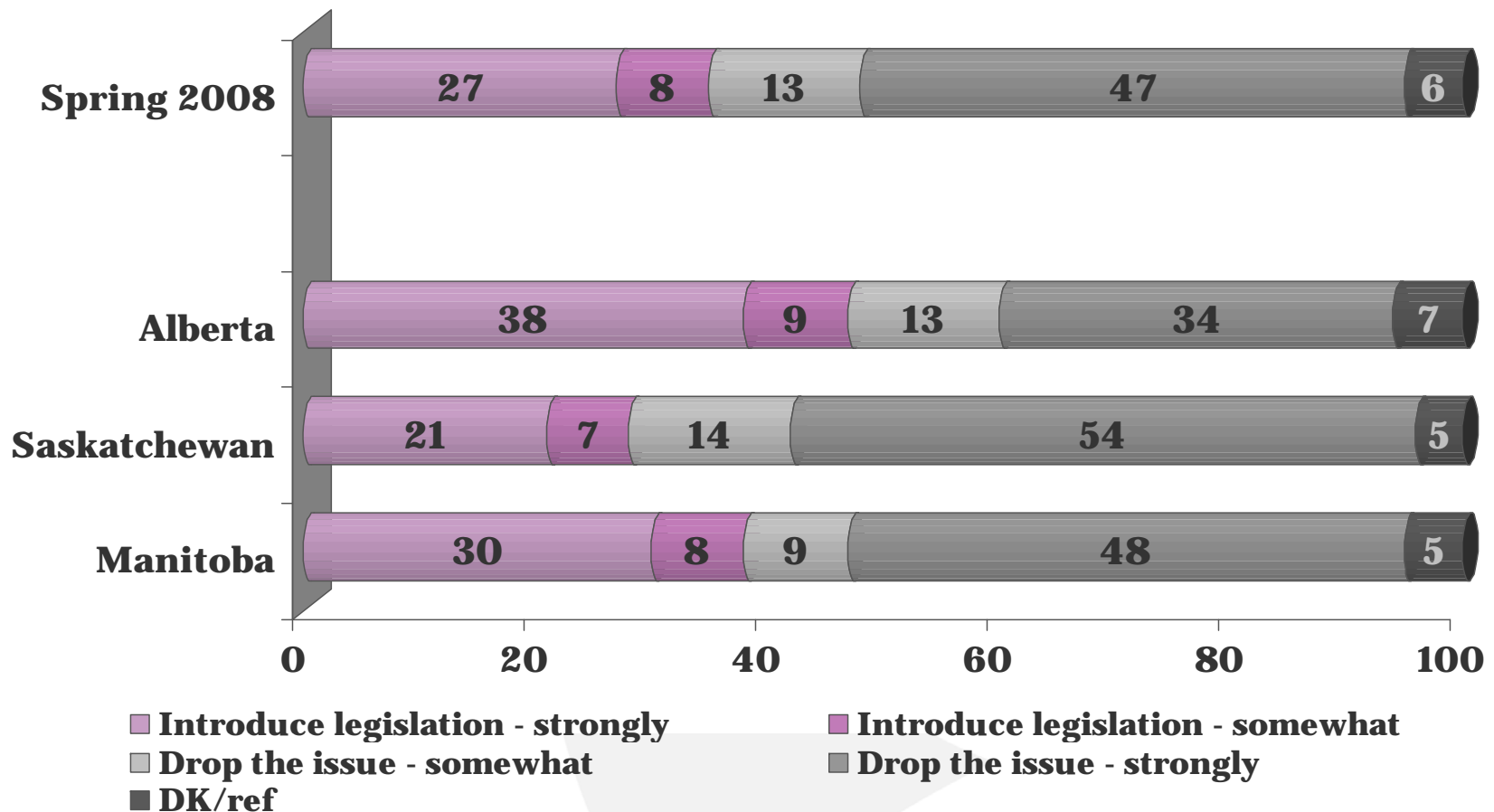




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Preference for Gov't to Have Introduced Legislation or Drop the Issue

The Federal Court of Appeal confirmed the lower court decision that stopped the federal government from removing the single desk for barley without introducing legislation to do so. Now that the court has ruled, would you have preferred that the government:

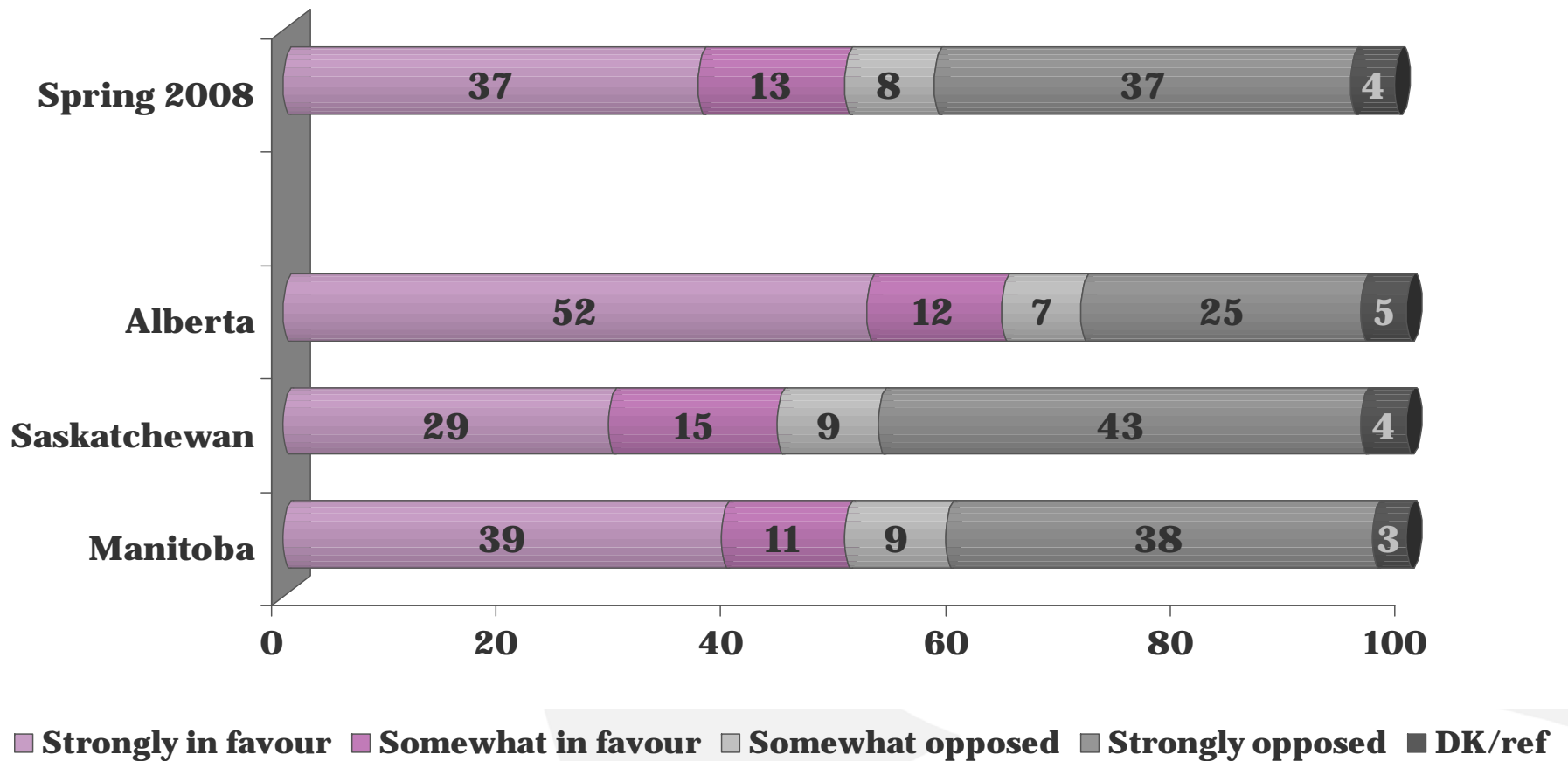




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Preference for Your MP to Vote on Legislation

The government has introduced legislation eliminating the single desk for barley. How would you want your member of parliament to vote on the legislation – in favour or opposed?

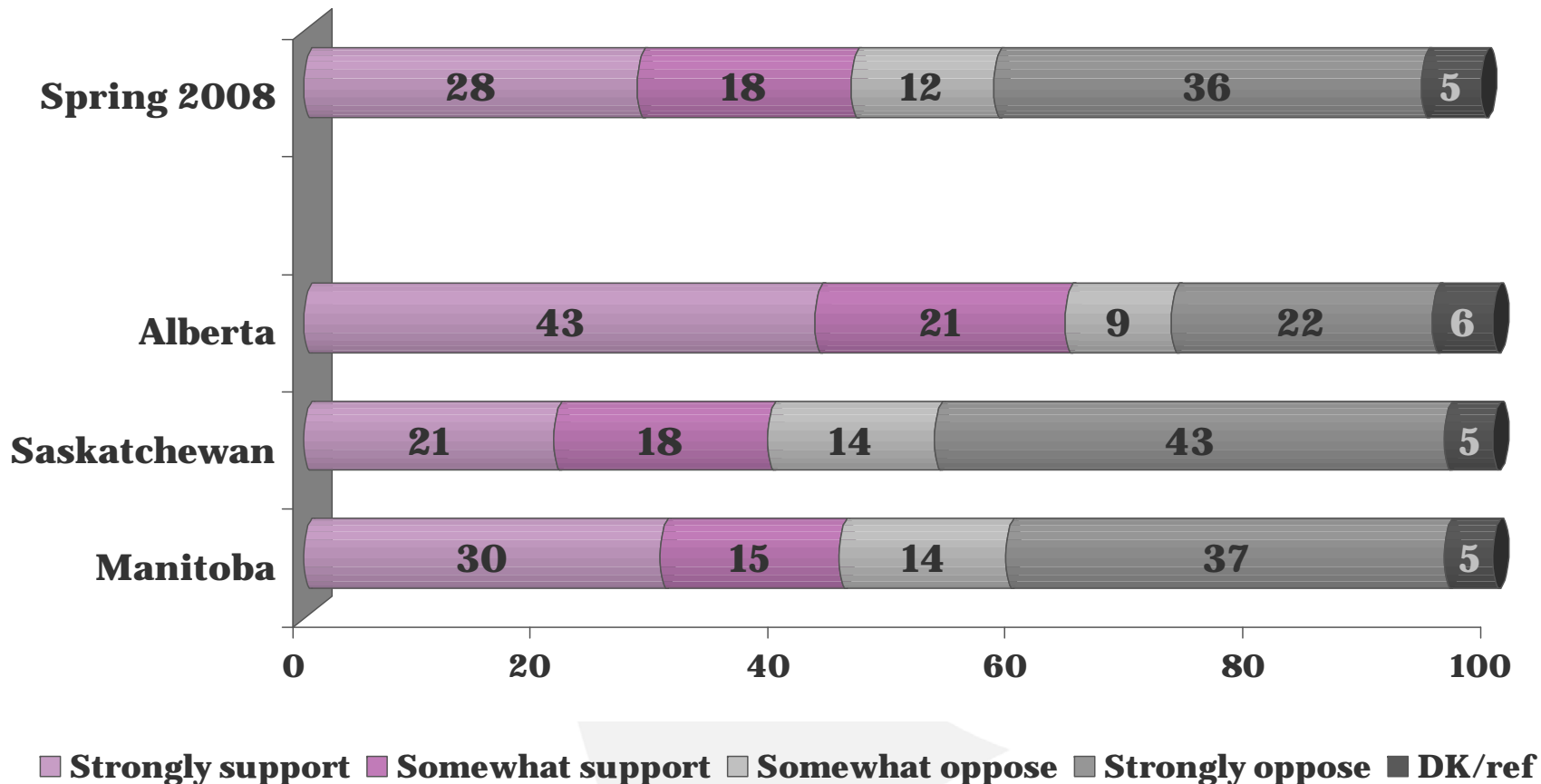




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Support/Oppose Legislation: Remove Barley Marketing from Single Desk

The legislation introduced by the government would allow the government to remove barley marketing from the single desk by an order from the federal cabinet. Do you strongly support, somewhat support, somewhat oppose or strongly oppose that part of the legislation?

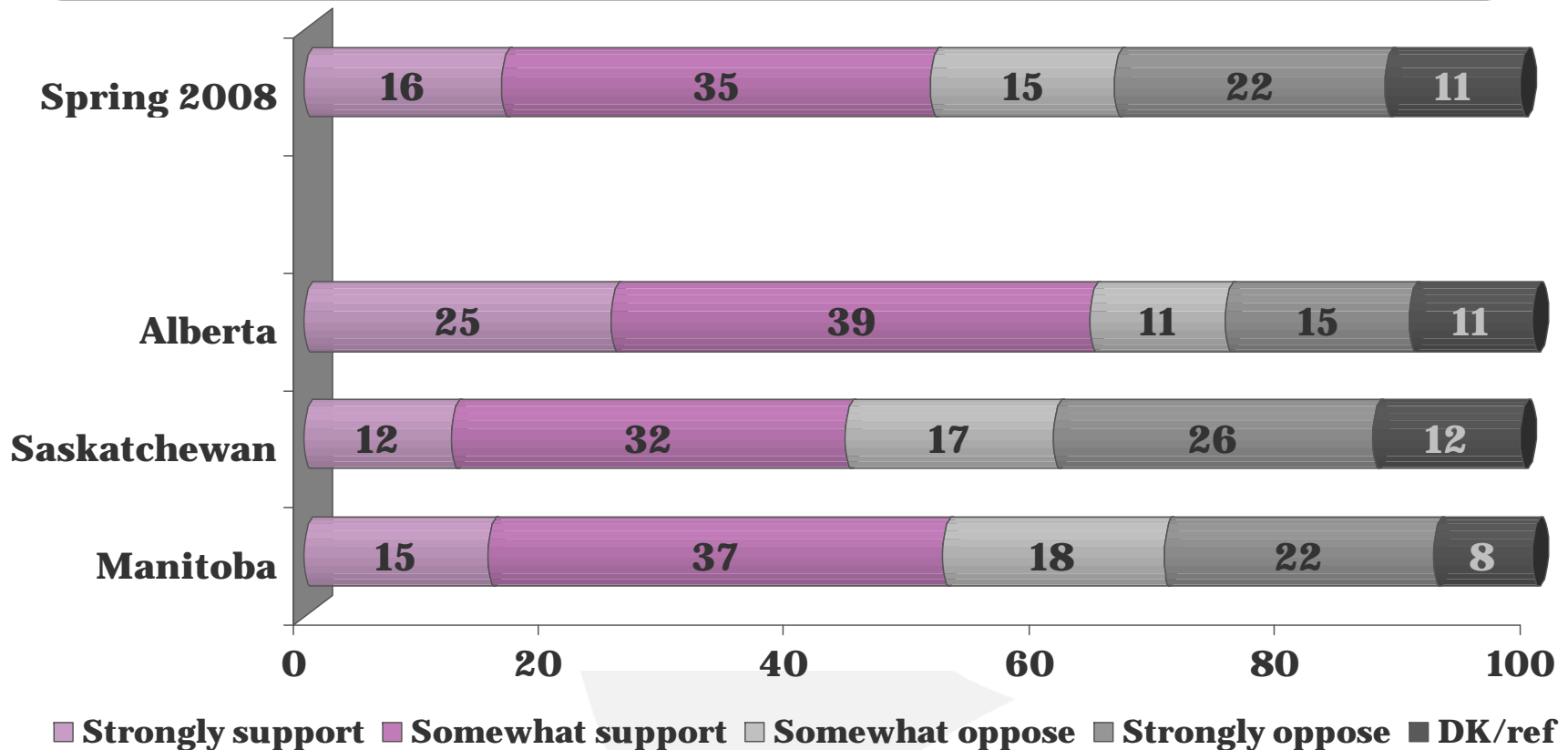




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Support/Oppose Legislation: Replace the Court Process

Because, to quote the government, grain elevator companies have alleged that the CWB sometimes uses its bargaining position to demand unreasonable terms and conditions, the legislation introduced by the government creates a new arbitration process to replace the court process for private grain companies that have disputes with the CWB. Do you strongly support, somewhat support, somewhat oppose or strongly oppose that part of the legislation?

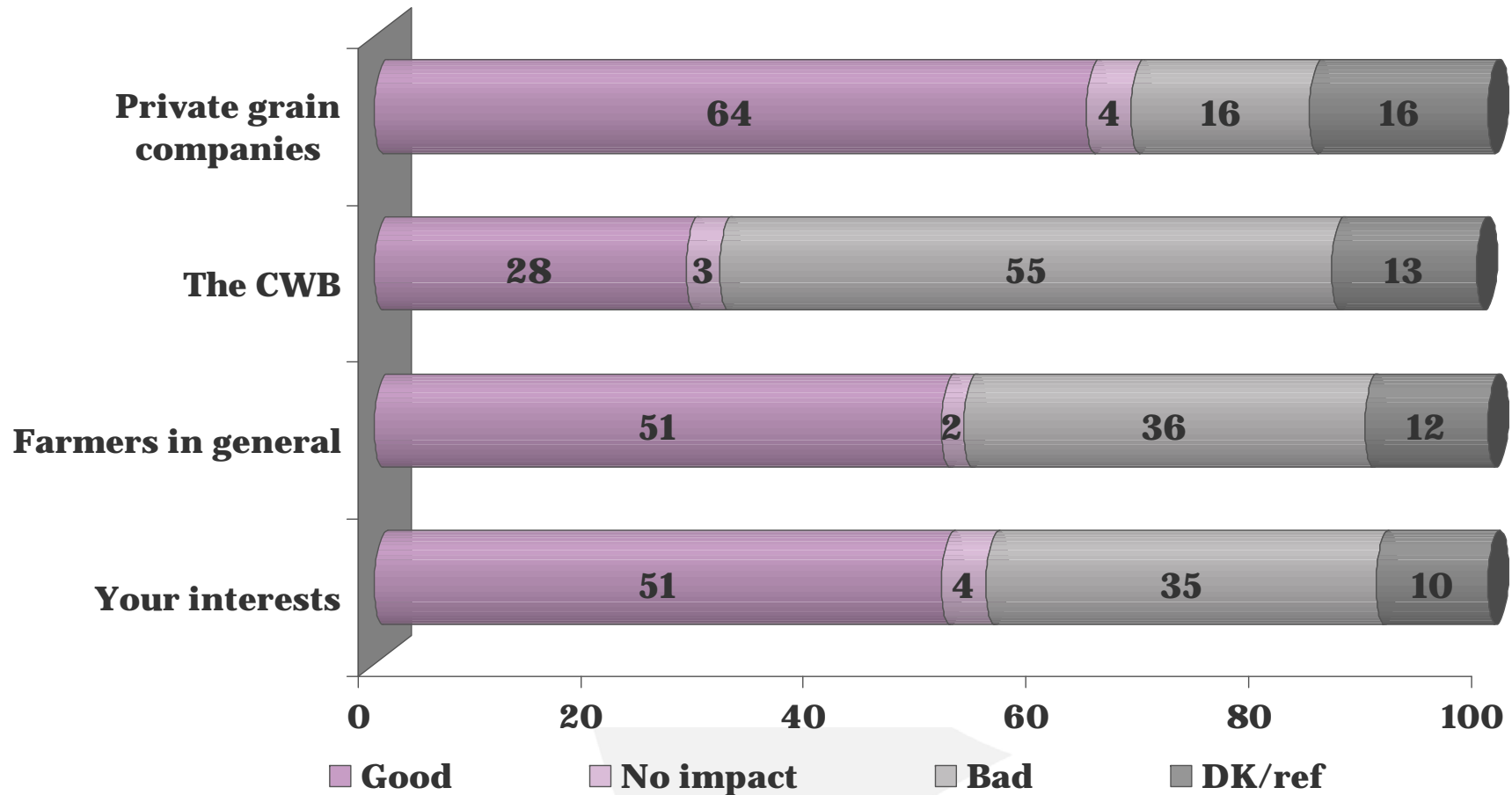




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Good/Bad for the Interests of...

Is that change good or bad for the interests of _____?

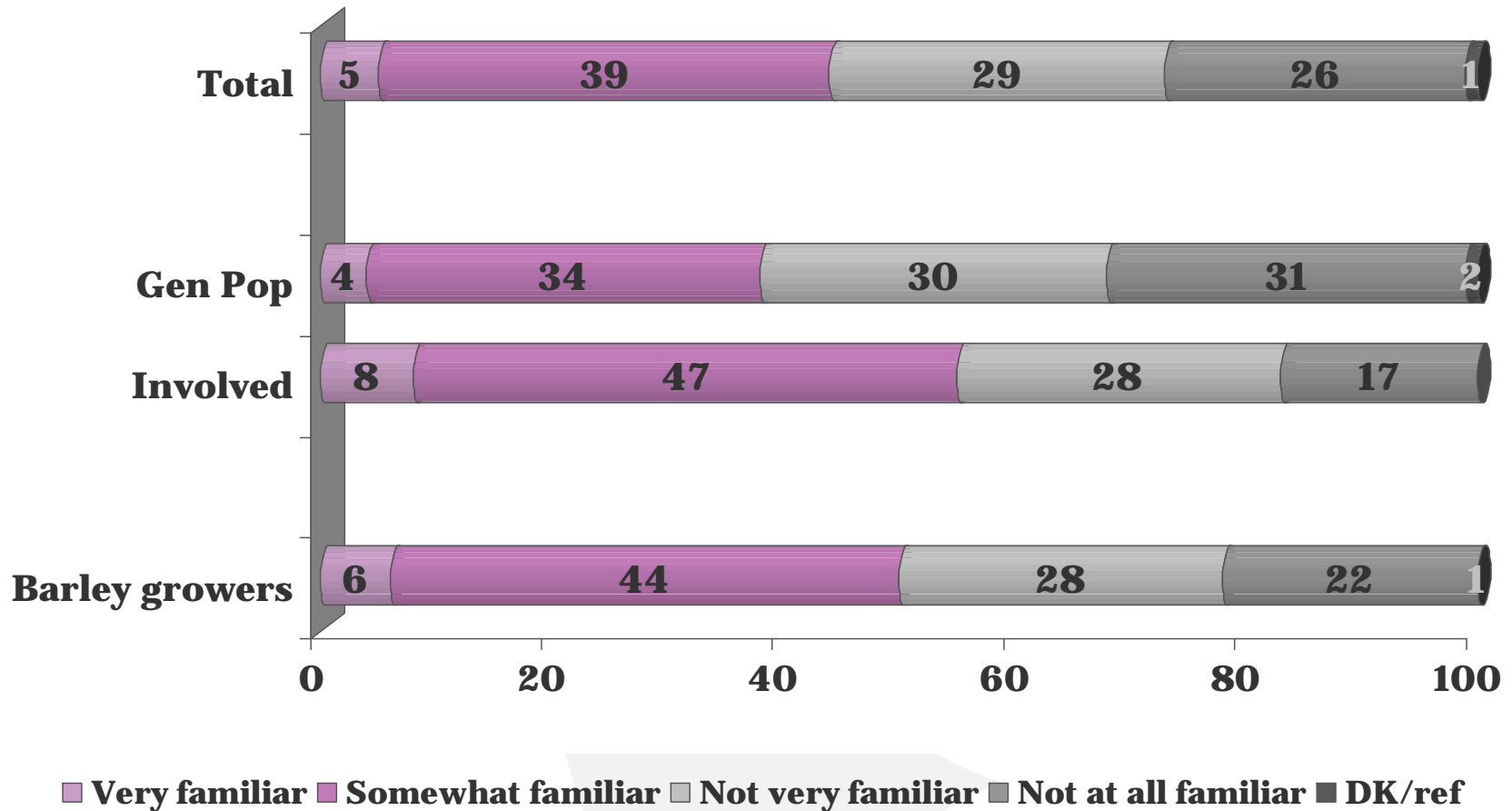




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Familiarity with CashPlus Program

How familiar are you with the new CWB CashPlus Program?





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CashPlus Program Meeting the Needs of Barley Producers

How well does the CashPlus Program meet the needs for barley producers?

